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ABSTRACT

A short-term training institute at Idaho State University for student financial aid administrators and other student assistance personnel was reviewed. The objectives of the lectures, seminars, and field trips were to measure and specify which attitudes and behaviors were appropriate to the role of financial aid officer and to measure attitudinal and behavioral changes resulting from the program. The participants were 33 financial aid administrators with varied work experience and educational background. Pre- and posttest attitudinal questionnaires were administered. A mid-term evaluation questionnaire was also administered to assess the program and produce feedback. From the data, it was concluded that the institute achieved its objectives and the participants were satisfied. (Recommendations and modifications for the program are discussed. The appendixes present the program agenda, evaluation questionnaires, and a review of federal student financial aid programs.) (BRB)

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THE IMPACT OF A SHORT TERM TRAINING PROGRAM FOR
FINANCIAL AID ADMINISTRATORS AND OTHER STUDENT ASSISTANCE PERSONNEL

by

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Foreword

In 1969, Idaho State University was urged to consider making application under Part L, Education Professions Development Act in order to conduct a training program for financial aid administrators, an area in which a critical need for formal training existed. The request came to ISU's Director of Financial Aid, Richard Miner, from the U.S. Office of Education Region VIII Director of Higher Education, Dr. Merle Ogle. Idaho State was in a good position to conduct such a training seminar since they have an outstanding graduate program in Student Personnel Work in Higher Education.

Mr. Miner contacted the College of Education dean, Dr. Richard Willey, and the chairman of the department of Counselor Education and Special Education, Dr. Arthur P. Lloyd, concerning the matter. They agreed enthusiastically with the need and concept of training for financial aid administrators and offered to grant graduate credit for the program provided that it met with their requirements and standards.

With the assistance of Dr. Donald Kline, University Director of Institutional Research and Development, Mr. Miner wrote and submitted the grant proposal. Approval was forthcoming late the following spring and the two-week Short Course for Financial Aid Administrators was held on the ISU campus in June, 1970. The institute dealt primarily with the "nuts and bolts" of financial aid administration and was deemed a success by the participants.

Because of the demonstrated interest by the financial aid community, President William E. Davis suggested that we again apply for another grant

to host a similar program the following summer. This proposal, however, was not favorably approved by USOE. Rejection was based primarily on the lack of adequate evaluation of the training program.

Undanted, we submitted a third proposal the following year, 1971, basing this proposal on our experiences of the 1970 program and correcting the weaknesses of the 1971 application. We proposed to move away from the fundamentals of financial aid administration and explore instead the psychology, sociology and economics of the disadvantaged/minority student, the very student for whom the federal aid programs are designed to assist. Also, we wished to emphasize counseling aspects and counseling techniques as related to financial aid generally and specifically to the disadvantaged. This approach was decided upon after analyzing the reaction of the 1970 participants toward this group of students when we became convinced that FAO's generally have little or no experience in understanding the special needs of these students. We had also discovered that many financial aid administrators have no concept of counseling techniques and indeed that many do not even view their roles as that of counselors.

The design of our proposal purposely lacked a strong emphasis on the federal programs and their regulations. We felt that three of the ten days devoted to review would adequately give participants a common ground to begin exploring the socio-economics and psychology of the disadvantaged as related to financial aid. Field trips to a nearby Indian reservation and migrant labor camp would give participants the opportunity to become acquainted with living conditions of disadvantaged students and thus have better insight into their special problems.

After we received approval of our proposal, USOE, Region X Senior Program Officer, Mr. Ed Baseheart, suggested that we consider including as

participants tri- program personnel, that is, Upward Bound, Talent Search and Special Services. Since these had been brought into the newly created Division of Student Assistance, his suggestion was well received and a grant adjustment made to include ten participants from this area of the 40 approved slots.

Based on the rejection of the previous year's application, we budgeted for a professional analysis of the training program and requested Dr. Cliff Bryan, Assistant Professor of Sociology at Idaho State University to conduct the study. Through the Public Employment Program (PEP), we were able to assign two senior sociology students to assist Dr. Bryan in conducting this study. Their report follows.

Although Dr. Bryan has acknowledge assistance that he received, I would be remiss in not taking this opportunity to add my thanks and appreciation to others without whom it would have been impossible to host this training program. Particular appreciation goes to Bennadine Ricker, Talent Search Director at ISU and Roy Urrea, student counselor from that office. Their assistance made the very sensitive field trips a reality. Dr. Opte and Ed Baseheart were extremely helpful, and Tom Monahan and Jim Nelson presented outstanding sessions during the short course. Dr. Martin Brooks, counseling pyschologist and formerly a financial aid officer, provided added insight into the counseling aspect as well as invaluable assistance in general administration. Without Dr. Lloyd's interest, it would not have been possible to provide graduate credit for participants.

It simply is not possible to list all those whose interest and assistance made the training program what I consider to be a success. Suffice to say, you are appreciated.

My very special and personal thanks are extended to the financial aid staff.

David C. Blackwell
Director of Financial Aid
Idaho State University

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In conducting an evaluation research report, a large number of persons are absolutely essential in assuring its successful completion. The current investigators found that the program directors and the personnel in the Idaho State University Financial Aid Office to be of an exemplary nature in their cooperation, support and encouragement.

We would like to express our sincere appreciation to Mr. David Blackwell and Mr. Cary Gould, the planners and promoters of the training program, for giving us the opportunity to conduct needed research in a relatively unexplored field. Our thanks also goes to Kathy McCullough, and Mr. Jim Stone for their very valuable advice. It would like to extend our appreciation to the secretaries in the I.S.U. Financial Aid Office for the additional work load that we placed on them: Ruth Thomson, Sue Thomsen, Gail Atwood, Donna Edwards and Jan Jordan.

Tom Monahan, Ed Basehart and James H. Nelson were instrumental in guiding our efforts while the training program was in operation; Len Green, Robert Horton, Dave Duncan and Herbert L'Angren were of invaluable aid in conducting the analyses of the data. We express our sincere appreciation to Susan Gayfield who, in spite of being yelled at on a marathon basis, did a splendid job of typing.

Finally, we express our thanks to all of the participants in the two-week training program. Without their considerate cooperation, this project could not have been accomplished.

Clifford Bryan
Michael Mace
Gregory Shoen

EVALUATION REPORT: SHORT-TERM TRAINING PROGRAM FOR STUDENT FINANCIAL
AID ADMINISTRATORS AND OTHER STUDENT ASSISTANCE PERSONNEL

CHAPTER ONE: INTRODUCTION

Statement of the Problem

From July 9 to 21, 1972, an intensive training institute entitled "Short-Term Training Program for Student Financial Aid Administrators and Other Student Assistance Personnel" was conducted at Idaho State University. The first major purpose of this conference was to provide the participants with a better understanding of the various services performed by financial aid administrators. The second major purpose was to implement and coordinate present policies and to discuss recent policy innovations in financial aid administration. In order to attain these general objectives, the program was designed to include the following features:

1. A review of existing Federal programs, including both financial aid and student special services.
2. An exploration of the special problems of disadvantaged students.
3. To develop an awareness of other supportive services and agencies.
4. To encourage members of the program to develop and express personal and institutional philosophies of financial aid.

The field of financial aid has only recently undertaken steps toward professional development. Consequently, only limited attempts have been made to coordinate the objectives and to examine the issues which revolve around this particular area of educational intervention. The short-term program at Idaho State University was instituted in order to promote a better understanding of the problems related to financial aid administration. It is the intent of this research project to assess the extent to which certain objectives of this program were successfully attained.

It is the direct concern of this particular evaluation report to examine both the behavior and the attitudes of the persons who participated in the short-term program. In addition, there are other somewhat controversial areas within the field of financial aid administration which are to be explored and discussed within this study. These topics include:

1. To what extent are financial aid administrators biased--toward or against--minority group students? If it is found that they are, what are the dimensions of favorable or unfavorable prejudice and what are the reasons?
2. What role does counseling play with regard to the position of the financial aid officer? What importance is assigned to this function by aid administrators?
3. What criteria are employed by financial aid officers in the administration of loans, work-study programs, and grants? Do they tend to favor one type of financial aid package over the others; and, if so, for what reasons?
4. What are the educational and experiential backgrounds of financial aid officers? Do these appear to be adequate

for this particular type of educational and occupational role?

5. To what extent do financial aid officers feel free from and other influences exerted by various agencies both inside and outside of the University? Do they feel as if they are set apart from the University? Or do they feel as if they must function in accord with the policies of the University administration?
6. Is there a consensus among financial aids personnel regarding national objectives, or is there a feeling that goals and objectives should be determined at a more localized or regional level?

With these general questions as well as several others in mind, it is the intent of this project to assess the impact of the short-term training program through the administration of questionnaires, personal interviews, and with participant observation on behalf of the research investigators. Through these procedures, it is the intention of the investigators to accomplish the following objectives:

1. To measure and specify certain current climates of opinion among financial aid officers regarding which kinds of attitudes and behaviors are appropriate to the role of the financial aid officer.
2. To assess the extent to which various attitudinal and behavioral changes may have occurred as a result of the short-term training program.
3. To evaluate the extent to which the short-term training program may have met or failed to have met its formal objectives.

The purpose of this section is to provide a comprehensive review of the literature on the topic of financial aid administration. The review is organized into three main sections: (a) general literature, (b) literature on financial aid administration, and (c) literature on financial aid administration in the United States.

Review of General Literature

In this section, a presentation is made of the general literature and other related literature. The information is presented in a separate entry in the second part of the (a) literature, (b) literature on financial aid administration, and (c) literature on financial aid administration in the United States. The review is organized into three main sections: (a) general literature, (b) literature on financial aid administration, and (c) literature on financial aid administration in the United States. The review is organized into three main sections: (a) general literature, (b) literature on financial aid administration, and (c) literature on financial aid administration in the United States. The review is organized into three main sections: (a) general literature, (b) literature on financial aid administration, and (c) literature on financial aid administration in the United States.

General Literature on Financial Aid Administration

One of the contemporary writings in the area of financial aid administration is the book by [author] (1972). This book is a comprehensive review of the literature on financial aid administration. It is organized into three main sections: (a) general literature, (b) literature on financial aid administration, and (c) literature on financial aid administration in the United States. The review is organized into three main sections: (a) general literature, (b) literature on financial aid administration, and (c) literature on financial aid administration in the United States. The review is organized into three main sections: (a) general literature, (b) literature on financial aid administration, and (c) literature on financial aid administration in the United States.

maintain that a needy student should be given aid. It is true that others take the position that such a basis for need is completely untenable based on faulty assumptions. Nearly all writers, however, do agree and enumerate a series of steps that a financial aid officer should take for consideration as a means of carrying out his role requirements.

The financial aid officer is generally regarded by all authors as being responsible for many duties in today's university. That is, senior colleges employ a number of financial aid officers. In the larger financial aid administrator in the larger colleges and universities employ his assistants to help administer multiple financial programs, his work also includes personnel supervision and management. In his particular capacity, the financial aid officer must work with students, faculty, staff, parents and secondary school officials. In short, financial aid officers must have a multiple orientation for: (1) they must be service oriented; (2) those who work as financial aid counselors must be student oriented; and (3) when their duties overlap in administrative responsibilities, they must also be program oriented.¹

While such contentions make it readily apparent that the field of financial aid administration is quite complex, one of the major conclusions of a survey by Willingham² was that one third of the persons who are financial aid officers can be classified at a low level of professional development. In this same survey, the respondents indicated that they

¹Atens, Frank C., and Stephens, Clarence W., Colleges and University Work Programs, Carbondale and Edwardsville, I-I, Southern Illinois University Press, 1970.

²Willingham, Warren W., Professional Development of Financial Aid Officers, Higher Education Surveys Report No. 7, Palo Alto: College Entrance Examination Board, November 1970.

about receiving the kind of training necessary to perform their jobs. In terms of this capacity, three out of four financial aid officers reported having received some form of job orientation, such as job experience, job description, and job administration and program procedures are important, but only one out of three reported having received any such orientation themselves.

Willingham's study, based upon a representative sample of 136 Western colleges and universities, also assessed certain attitudes and perceptions of training needs among financial aid officers. The kinds of training that the officers expressed a need for having or with certain indications about the types of roles that they feel they should perform. For example, school law (31 percent), finance and taxation (28 percent), and research methods (39 percent) were judged as being the least helpful kinds of training, while need analysis (83 percent), counseling (80 percent), and aid administration (73 percent) were judged as most useful.³ When asked about which kinds of workshop topics would be the most useful for new financial aid officers, the results were: preliminary reports (84 percent), economic trends (37 percent), records systems (74 percent), need analysis (93 percent), minority/poverty issues (74 percent), research methods (41 percent), and research findings (39 percent).⁴

There are several implications which may be derived from the findings. First, it would appear that many financial aid officers are more concerned with the mastery of certain bureaucratic formalities than they are with keeping abreast of current social trends; on the other hand, Willingham found that the more experienced officers place more

³loc. cit., p. 23.

⁴Willingham, op. cit., p. 10.

value on those topics which have social relevance, e.g., trends in social bills, minority/poverty issues, trends in education, and recent literature and research findings.⁵ Again, certain disparities may be noted. A minority of financial aid officers, for example, view training in social trends and research findings as being useful; but the majority cite the importance of need analysis as being helpful--need analysis is but another form of research and the conclusions are, in fact, a type of research finding. Only through some knowledge of research methods can these persons adequately assess whether or not a need analysis is adequate, if the procedures are appropriate, or if the conclusions are valid and reliable. Again, while the majority of respondents indicated the importance of learning about minority/poverty issues, little value was placed on the usefulness of knowing about economic trends, i.e., a social phenomenon which directly explains and accounts for poverty.

Among financial aid officers, there appears to be quite a bit of concern about the importance of attitudes toward the college, the community, the students and toward their work. Willingham found, for example, that three types of ethical standards were judged as being "very important;" these were (1) responsibility to students, (2) responsibility to the college, and (3) confidentiality of records.⁶

Adams and Stephens,⁷ who place a great deal of emphasis on this area, are concerned with establishing a proper set of attitudes as an element of significance in the background of each student on student-work programs.

⁵loc. cit., p. 11.

⁶Willingham, op. cit., p. 14.

⁷Adams and Stephens, op. cit., p. 3.

They formulate a concept of student work which could serve as a basis for the attitudinal orientation of financial officers. If students need to be self-motivated, if they must be encouraged to turn their own attitudes in a proper direction, this is a concept which there does appear to be a controversy: what kind of attitude should financial officers have toward students who do (or will or can) work versus those who do not (or won't or can't). Adams and Stephens⁸ assert that there should be periodic assessments of the achievement of those on student-work programs. It is said that these evaluations should become a part of a student's permanent record in the University Placement Office. These authors contend that meaningful work provides people with worthwhile purposes in life and that work can give a feeling of accomplishment even if there is no apparent feedback. Doermann,⁹ on the other hand, argues the argument that the large number of lower-income potential college enrollees do not have the reading facilities to be able to cope with the regular assignments and also be expected to spend long hours working.

It is in this area that the greatest controversy seems to be involved: what is the type of attitude that financial officers should have toward students who are unmotivated, who are not self-motivated, who have demonstrated their academic potential even though needy potential students who are unmotivated, unwilling or unable to work, and give little reason to suspect that they will perform very well in college?

⁸loc. cit., p. 11.

⁹Doermann, Humphrey, "Lack of Money: A Barrier to Higher Education," Barriers to Higher Education, New York: College Entrance Examination Board, 1971, pp. 130-147.

The related literature suggests that there are at least two sides to the argument, each with its own supportive rationale.

Adams and Stephens¹⁰ voice their concern that one result of student financial aid has been that colleges and universities have lowered their admissions standards for students. Consequently, college and university teachers have been compelled to lower academic standards since disadvantaged students are often ill-prepared to encounter traditional classroom competition. These authors feel that the burden for preparing potential college students for the demands of college life should be placed on the high schools, allowing colleges to concentrate on the students in the colleges once again and thereby enhance the welfare of the nation.

Adams and Stephens¹¹ state that it is generally recognized that students waste from 15-20 hours per week unless they have a job or some other social activity to consume their non-school time. It is their position that, next to studying, work is the most important activity since its rewards are multiple--education, social and financial; a working student is seen as an asset, not a liability. These authors claim that it is a principle of financial management that a needy student should accept whatever financial aid is available. Student work, moreover, should be a significant part of the financial aid package because work experience meets both educational and financial needs. From their perspective, it is proclaimed that a student who is unwilling to work for the opportunity to attend college does not deserve

¹⁰ Adams and Stephens, op. cit., p. 207.

¹¹ loc. cit., p. 209.

the chance to obtain a degree.

Such an argument is likely to be countered by others--and the controversy will perhaps be based upon notions regarding the role of the university as well as whether the financial aid office should function as an agent of social change. Henry¹² has made a comparison of the academic performance of students who worked part-time with those who did not. He concluded that employment up to 15 hours does not adversely affect student grade point averages at any ability level and that part-time work in moderation can provide additional sources of income without endangering classroom performance. Schlekut,¹³ who found that socioeconomic status is an important variable in financial aid decisions, concluded that the student of a lower income background seems more likely to receive a loan or a job than a grant or a scholarship. In other words, this suggests a kind of pattern in which lower-class students are more likely to assume indebtedness in the form of a loan or to have to work their way through college while more fortunate students may be the recipients of scholarships.

These different arguments may be based on several different assumptions which should be brought into consideration:

1. On what basis can the claim be made that students "waste" from 15-20 hours per week? How is the term "wasted" to be defined? There are some persons, for example, who would

¹²Henry, Joe B., "Part-Time Employment and the Academic Performance of Freshmen," The Journal of College Student Personnel, 8:4 (July 1967), pp. 257-260.

¹³Schlekut, George A., "Financial Aid Decisions and the Socioeconomic Class of Applicants," The Journal of College Student Personnel, 9:3 (May 1968), pp. 146-149.

claim that drinking in bars or sitting in the sun, even for of wasting time; others would staunchly claim that some of the greater learning experiences might occur with such activities.

2. The basic argument is advanced: that students with a demonstrated potential, high mobility aspirations, a high degree of commitment, and a high level of motivation--but who are willing to settle for what they can get--are the best prospects for financial aid. There are some who would claim that these are the times of students who will succeed successful anyhow--with or without the help of a financial aid administrator.
3. It may be that motivated students with high levels of aspirations and who give evidence of a high performance potential in the academic arena are "safe bets" for financial aid. The granting of aid to such students is likely to be rewarded by a high "success ratio" in those cases in which financial aid endeavors might be assessed or evaluated on the basis of the number of clients who graduate. The selection of such students calls out the "high risk" categories and possible evidence of "failure" on behalf of the financial aid personnel.
4. The granting of aid to those students who demonstrate superior motivation, academic potential and high aspirations may be seen as the acknowledgement and recognition of existing pools of talent. By allocating rewards to those who already have desirable attitudinal configurations,

others are ignored and rejected. There are many who, in the name of equality of educational opportunity, pose the argument that colleges and universities should get into the "business" of "discovering" new talent rather than following the traditional pattern of re-identifying and rewarding previously existing talent.

5. The notion of "settling for whatever one can get" may be very questionable in the social climate of today. Financial aid officers can relate many similar experiences, but one actual example may be illustrative: a black Nigerian student was promised a grant in a small Iowa college. Upon his arrival, he was given a work-study program--the work involved pulling weeds out of campus flower gardens for a small hourly wage. In his own mind, he saw this as a continuing evidence of the caste-system of black-white relationships in this nation; he was the only menial student worker in public view, his wages were considerably lower than those of the regular campus grounds-keepers, and he often wound up working alone. He became very bitter and quite anti-American--and this is hardly the objective of the foreign student exchange program. Such behavior on behalf of financial aid administrators can create more social problems than they resolve.

Although many empirical studies and much of the contemporary writing center upon the problems of public high schools and paint a dismal picture of the possibilities of correcting these difficulties within the near (or even distant) future, some of the authors reviewed still insi-

that financial aid officers should select needy students for admission with emphasis upon their academic achievement, character, and future promise.¹⁴ A great deal of research indicates that many lower-income and minority group students come from high schools in which there are fewer facilities, poorer teachers, an undesirable social climate, antiquated reading materials, and inadequate financing. Again, there is little reason to believe that even the most well-intentioned of high school administrators have the power to remedy these conditions--and it only follows that the graduates of such high schools will be characterized by lower academic achievement, different types of character, and less-than-obvious future promise. Several of the authors reviewed claim that the admission of such students results in the lowering of academic standards--an argument which was first popularized by J. Edgar Hoover in his attacks upon the University of Michigan for devising recruiting quotas for minority group student populations. It must be recognized, however, that because certain requirements might be reduced for admitting students into a university, it does not necessarily follow that requirements would be reduced for graduation. If the university is to function as an agent of social change, the responsibility falls upon it to instill motivation, to enhance aspirations, and to create talent and skills necessary for the granting of formal educational degrees and credentials.

It is in this area, then, that the attitudes of counselors--and their perceptions of the roles that they should play--may be crucial. If they

¹⁴ Moon, Rexford G., Jr., "Student Aid in a Decade of Decision," College Student Personnel Work in the Years Ahead, Gordon Knopf (ed.), Washington, D. C.: The American College Personnel Association, 1961, pp. 60-68.

view their positions as being a positive force for social change, certain outcomes might be predicted from their actions. If, however, they embrace the philosophy that only those students who are already characterized by "white middle class values" should be aided, it can be expected that minority groups and disadvantaged societal members will remain an excluded group in terms of formal educational attainment.

Some of the problems in this area have been explored by other authors, and the relationships between financial aid officers and members of minority groups have drawn some criticism. McClellan¹⁵ says that much more than the mere availability of funds is needed if black, Puerto Rican and Mexican-American students are to attend college. It is his contention that students must be recruited while they are still in high school and they must be helped to stay in college once they are there. Consequently, this means that these students will need special counseling, tutoring, remedial efforts and perhaps reduced course loads (note this in comparison to other observations that students waste from 15-20 hours per week). Furthermore, it is advocated that financial aid officers must become an integral part of the recruitment process--even to the extent of bringing to the college an "aggressive young Afro-American with his own recruiting staff."¹⁶ Again, as opposed to the arguments of other authors that students should be happy with what is available to them, McClellan argues that disadvantaged students should not be admitted to the University UNLESS they can be GUARANTEED financial aid throughout the duration of

¹⁵McClellan, Frank, "A Black Student's Reaction to the Present System of Financial Aid," Financing Equal Opportunity in Higher Education, New York: College Entrance Examination Board, 1970, pp. 16-19.

¹⁶Ibid.

his enrollment.¹⁷ This can be seen as a necessary step to mitigate against the broken promises which so often have caused the rising expectations and the resultant frustration that so many of these people have faced in several previous attempts to intervene on their behalf.

The logic behind McClellan's arguments are supported by Bellia's investigation¹⁸ in which it was found that white students had a more positive reaction toward financial aid administrators than did black students. Black students tended to be much more negative toward counselors' attempts to establish a rapport. Bellia found that many students felt as if they were being treated as "cases" rather than as individuals--and this is particularly likely to be the situation given that the student feels the counselor relates to him primarily on the basis of prior "academic achievement," "motivation" and "future potential" as generally assessed and processed in terms of standardized test scores and numerical scoring and admissions procedures. For many students, the awarding of some type of financial aid may have a psychological impact in that it may be seen as a vote of confidence, especially if it is in the form of scholarships.¹⁹ The mere process of granting or refusing to grant financial aid to a needy student can have an impact upon his education career.

As is apparent from the literature reviewed to this point, it is clear that the financial aid officer occupies a key role in the university. He is in a unique position in that he may be an agent of social change or

¹⁷McClellan, op. cit.

¹⁸Bellia, Anthony J., "Variations in the Response of Black and White Students in Their Relationship with the Financial Aid Counselor," The Journal of Student Financial Aid, 1:2 (November 1971), pp. 42-43.

¹⁹Kimball, Roland B., "No Scholarship Help?," The Personnel and Guidance Journal, 46:8, (April 1968), pp. 782-785.

of the status quo; he may enhance students' educational aspirations or contribute to their levels of anxiety; he may spell the difference in the completion of a college career or the early termination. His relationships with other university agencies and personnel are also of key importance. Although he is not a member of the business office staff, he must deal constantly with the bursar, the comptroller and the treasurer and should understand their problems if he expects to fulfill his own role. Often he may be the advocate of the student against the fiscal and budgetary officers. He must also work with the admissions staff and know their goals and procedures. In this capacity, he must work beyond the admissions office by helping and counseling students four or more years after they have been recruited and must help them buffer their dealings with the money men.²⁰

In fulfilling this complex role, the financial aid officer must also cope with many different social problems and academic issues. In the following section, several of these issues are identified and discussed, especially as they work to influence the role of the financial aid officer and the students that are likely to be his clients.

Social and Academic Issues Involved in Financial Aid Administration

As has been previously mentioned, the formalized field of financial aid administration is relatively new in the area of education. This is reflected by the fact that there are very few professional journals in the field, that few workshops have been held throughout the nation, that there is no national code of ethics, and that most of the training for

²⁰Dickson, Douglas R., "Do You Believe Any of These Ten Myths About Financial Aid?" College Board Review, 73 (Fall 1969), pp.

financial aid officers has been that of on-the-job training. As is true in any new occupational or educational area, a new discipline brings with it new problems.

One of the major problems that is attached to financial aid administration in colleges and universities revolves around the general recognition that formal education is one of the few remaining avenues of vertical mobility. Few young people are currently able to set up their own businesses, begin farming, or to establish their own enterprises. More and more, the only way in which a young person can obtain a job is to become somehow qualified by attaining some type of formal higher education. Since this is the case, the majority of the population has begun to view access to higher education as a right rather than a privilege. At this point in history, nearly 50 percent of all college-age persons do enroll in some kind of institution of higher education. There are, however, several groups of people who have experienced a great deal of difficulty in enrolling in college--some cannot afford it; some come from high schools which have not adequately prepared them for college work; some perhaps do not know how to take necessary steps toward college enrollment; and there are probably some who do not know if they should undertake the risk.

Again, in our nation, there is an increasing commitment to the notion of equality of educational opportunity. Since education is a right, and since education is almost a necessity for occupational placement and success, all persons should have an equal opportunity to pursue higher education degrees. On the other hand, it is well known that this opportunity has been denied to many disparate groups of potential students. In a massive attempt to resolve this basic problem, financial aid offices

have been established in many colleges and universities.

For a very large group of potential students, the financial aid administrator holds the key for the opportunity to pursue higher education, i.e., it is the financial aid officer who is to assume the responsibility of providing an entity that many claim is a basic human right. It is this feature of the job that Froomkin²¹ claims makes the financial aid officer important as well as potentially dangerous to the whole fabric of the American nation.

So long as college attendance was the privilege of a limited proportion of the population, it was sufficient that it proceed with relatively little public monitoring. As access to higher education has assumed progressively greater importance for increasing numbers of people, however, there has been a new commitment to examine the process and to make a public accounting of the outcome. Most authors²² agree that little is now known and much more must be known about admission to college if there is to be any hope of moving toward the societal objectives now gaining public acceptance. Willingham²³ asserts that in the area of college admissions there has been a shift from a scholastic to a societal philosophy. The traditional scholastic view implied restrictive admission, traditional curricula, and close attention to academic standards and preparation. This philosophy, which has been historically dominant in most institutions, bore the implications that college was designed for

²¹Froomkin, Joseph, "Is Conventional Financial Aid Obsolete?" College Board Review, Summer 1968, p. 5.

²²Willingham, Warren W., Free-Access Higher Education. New York: College Entrance Examination Board, 1970.

²³Loc. cit., p. 9.

the college must afford to do and the student's inclination to accept or to threaten not to accept it. Attendance is, even the more so, a privilege that college-bound, often dependent, young adults have to exercise and then to maintain.

The new societal philosophy of college admission differs considerably in that the primary emphasis is upon fitting the college to the characteristics of the student rather than vice versa. It emphasizes periodic enrollment to develop and maintain the individual's intellectual awareness, his career skills and his value to the community. This newer view has resulted in the admission of a very heterogeneous student body with a highly divergent complex of individual needs and interests. These new students, however, are still confronted with the familiar barriers of cost and institutional selectivity.

Institutional costs and selectivity are two major issues which are embroiled in a great deal of controversy. For the needy student, particularly from a disadvantaged background, these two factors, along with residential proximity severely limit the accessibility of colleges and universities. In the face of high living costs, the needy student must often limit his choice of colleges to those nearest his home. To the extent that nearby colleges are characterized by high tuitions and selective admissions, such a potential student is denied accessibility to higher education. This is a fact that most persons do acknowledge. The question appears to be rooted in what, if anything, should be done about it.

Agnew²⁴ claims that there are two methods by which unqualified students are being swept into college "on a wave of the new socialism":

²⁴Spino T. Agnew on College Admissions," College Board Review, Spring 1970, pp. 12-15.

one is the open system and the other is the open admission system. Both are based on the premise of lowering admission requirements. This has led to a "universal" social problem which in turn has led to the deterioration in the quality of college and university education in the host of other ailments:

We created our own difficulties the day we (and I mean the liberal academicians) decided that a college or university should double as a settlement house. Once the decision was made that Negro or culturally deprived youngsters should be admitted to first class colleges, without the usual prerequisites, the escalation began.

From Agnew's perspective, any student--disadvantaged minority group members or not--should not be admitted to college if he does not meet certain standardized academic requirements; furthermore, it is claimed that the practice of admitting unqualified students and subsequently flunking them out is unfair. Agnew, who espouses a belief in a "natural aristocracy," upholds the traditional pattern of selective college admission as a pragmatic tool to "first, to nurture and to advance the natural aristocracy through the rigorous demands of intellectual competition." This particular type of argument has drawn a great deal of opposition. Astin,²⁵ for example, states that Agnew only reiterates one of the fallacies commonly used to support the concept of selective admissions; that academic standards are somehow determined by admission standards. Astin makes the point that if this were indeed the case, there would be no need for colleges to award degrees nor to assign grades nor to even assume any responsibility for educating the students. They would simply serve as talent scouts and certification agencies.

²⁵Astin, Alexander W., "Responses to Spiro Agnew on College Admissions," College Board Review, 76, Summer 1970.

business, industry, and the grade school and professional schools. The merit notion might be supported even by the notion of inherent ability in the ancient Greek argument (a position which receives progressively less support from many authors and researchers), but there is still a problem to do with those who are not members of the "natural aristocracy." Hatch²⁶ makes the observation that our society has reduced itself to only two alternatives: to go into the armed services or to go to college. He raises the question of whether our educational system, which was designed for a very select group of young people, is capable to the needs of a massive heterogeneous body of students. In expressing some doubt of the feasibility of this end, he asserts that our present financial aid system has evolved from attempts to provide for many a kind of education which was designed for a few. While he claims that it is working fairly well with its merits for which it was designed, it is "hooked to a rocket with only one direction and which is loaded with passengers who want to go in many directions." Again, it provides assistance only to those who make the socially accepted choice of going to college; there is little help available for those who might try to undertake an alternative career.

Needless to say, students from low income families need all the help they can get to go to college.²⁷ The kinds of help that they receive, however, can create certain kinds of problems. As more and

²⁶Hatch, William T., "Could This Financial Aid System End Student Unrest?" College Board Review, 72, Summer 1968, p. 8.

²⁷Hanford, George H., and Nelson, James E., "Federal Student Loan Policies: The Dangers are Real," College Board Review, Spring 1970, p. 18.

more help is needed in the form of loans, especially for the low-income student may be a cumulative debt to a point where the potential of a student to borrow some money may be outweighed by the cost of a student's loan. Some may believe that students view their financial situation differently--some may be unwilling to assume financial responsibility for their educational careers. They come to the conclusion that there is an association between graduation and indebtedness. This is especially true for the financial conservative student from a low-income background who is being eliminated from a number of institutions. Again, this is only true for some students, in light of present debt obligations, tend to stay away from majors where the economic potential is not very bright. What this could mean, then, is that some potential students may be deterred from college attendance on the basis of their willingness to undertake financial risk as well as their economic background. It is true that many who would claim that financially conservative students do not necessarily be denied the chance to enter in the areas of science, education, politics, the military and other major social institutions.

This particular phenomenon of denial of access to the lack of encouragement for students to acquire financial aid assumes even greater saliency in view of various philosophical and social controversies which surround national priorities. Our nation is presently dedicated to the financing of education that rewards participation in supports the military effort²⁸ (an enterprise which in and of itself is being called into question). This is exemplified by (1) our investment in student subsidize national military academies, (2) institutional based ROTC

²⁸Sidar, Alexander G., Jr. "The Need for a New Financing Higher Education," College Board Review, Summer 1972, pp. 8-9.

programs with student subsides, (3) specialized programs such as ROTC, AFROTC and AIRROTC, (4) on- or off-campus educational opportunities for officers, and (5) subsidization of higher education for veterans who have participated in war or at least in international policing actions. At least two groups are directly excluded from these types of funding: (1) those involved in military efforts. There are several groups as a result of this current policy of student exclusion of the military effort. In the first place, the three major military academies (\$162 million) is the same amount that provided for the entire National Defense Science and Engineering Graduate program (\$162 million), and this figure does not include the expenditures for the postgraduate institutes of the three major military academies. The G. I. Bill for the past academic year was approximately \$1.5 billion. It has been conservatively estimated that the public bill for four years of education in the major military academies is \$1,000; this figure does not include pro-rated shares of the cost of physical plant facilities.³⁰

To the extent that there is a commitment to equality of opportunity and equal access to higher education, it must be recognized that males who have or are currently involved in the military effort appear to have "more equal" opportunities than is the case with other potential students.

³⁰ Ibid.

³¹ Ibid.

Even so, it is true that there may be a shift in national priorities, and even then the problems would not be solved merely by making money more available to low-income potential students. There will still be the problem of fitting the college to the needs and interests of the individual student. As Harris³¹ indicates, students will need several "resourceful uncles" on campus to help them overcome their special problems--and it seems probable that one of these uncles will have to be the financial aid officer.

By "special problems," Harris means that there are certain unique problems that a lower-class adolescent is likely to face in adapting to the middle-class environment of college. One adjustment problem peculiar to this type of student may be his intensified apprehension upon approaching the campus. To him, the campus is often identified with certain people that he has met in the past--men who sit stoically behind massive, impressive desks and who live in aloof, clean, quiet suburbs. When he has not feared these people, he has felt crude and uncomfortable in their sophisticated presence. Such perceptions of the white middle class on behalf of the poorer adolescent often produces reactions of servility and hostility; and this perception is likely to affect his relationship to the campus.

Another adjustment problem for many lower-class students, especially those from rural or semi-rural areas, concerns the strength of familial ties. If, for example, graduating from college means that the graduate becomes a member of the middle class, then success in college for the disadvantaged student almost inevitably leads to some degree of

³¹Harris, John W., "New Role for the Aid Officer: 'Resourceful Uncle'." College Board Review, 67, Spring 1968, p. 24.

alienation from his family. Such a student may be uncertain as to whom to follow--to lead him--but he is increasingly aware that where he goes to lead him--it will be away from that which he perceives to be his source of support. This is quite different from the situation of the middle class son who is merely fulfilling family expectation in succeeding in college.

Certain kinds of cultural values may also result in conflict when disadvantaged students enter the campus. Chicanos, for example, are taught that it is improper for a person of subordinate status to look at a superior directly in the eye--to glance downward upon being addressed is the proper way to express deference. Little children do not look adults in the eye when being spoken to--to do so would imply insubordination. This stands in marked contrast to middle class norms; to look someone in the eye while talking to them implies honesty, sincerity, conviction, trustworthiness and self-reliance. On the other hand, to look away is indicative of dishonesty, prevarication, cowardice, and ulterior motives. A Chicano student, as an illustration, might apply for a certain amount of money from a financial aid officer. The officer in turn would look the applicant in the eye and ask, "Do ~~you~~ REALLY need that much money?" The Chicano, in granting deference in ~~accord~~ with the manner in which he has been socialized, would look down~~ward~~ and answer affirmatively. The financial aid officer, given that he is unfamiliar with such sub-cultural physical expressions, might conclude that this shifty-eyed Chicano was lying and consequently deny his request. Such misinterpretations of communications are quite likely to increase the "special problems" of adjustment for this particular student.

The whole treatment program for the disadvantaged student has been developed with the primary concern of increasing the student's self-reliance and self-respect. With the realization that many of these students have no experience in managing money, the financial aid officer has the opportunity to function as a financial counselor. The goal is to help the student in the operation of his or her subsidized program and to help in budgeting. The educational goal is that a practicum will be developed to teach these disadvantaged students to establish economic priorities, to move purposefully and persistently toward deliberately established goals, and to keep financial records. Again, certain students from various minority groups may present additional problems to the financial aid officer along these dimensions. Among some Indian tribes, some black families, certain Eskimo tribes, and among Chicanos, the cultural expectations may be based along a form of communal interdependence. The individual who has money is expected to share it with others, especially in times of disaster, illness, or misfortune. For these people, the individual who is personally in financial tribulation is not only a source of "trouble" but also a "black" for the individual involved. It is common with such people that the entire family, sometimes distant relatives, or even an entire tribe. A young black student may part with the money obtained for financial aid because a sister back home is in "trouble." An Indian student may lend his money to a cousin with financial problems--he could face severe familial and tribal disapproval if he did not. To the extent that the financial aid officer may be unfamiliar with such customs, he is once again likely to only increase the "special problems" of such students.

Harris, op. cit.

There are but a few of the social and academic issues which are faced by financial aid administrators in the forthcoming year. In discussing expected future trends, predicted an increasing emphasis on accountability and on "hard nosed research." He clearly emphasized the point that financial aid officers are going to have to do some very rigorous methodological studies in order to legitimize the profession. As the current investigators have discovered, there appears to be little work in this area as of yet; as other surveys have indicated, there is not much support among financial aid officers either for conducting research nor for learning to interpret the findings.

Such attempts at empirical research shall be needed even more so in the future. For as Nelson predicts, there will probably be even more programs instituted by both the federal and state government in order to better serve the needs of students and the educational system as a whole. One of the major problems in the area of financial aid is, according to Nelson, is that there are many students who are not informed about the necessary procedures for obtaining financial assistance; from his perspective, this is one of the most important areas for the concentration of the efforts of financial aid officers. Research in areas such as these could be very helpful in refining and locating target populations and in determining which kinds of financial aid packages might be the most appropriate for different kinds of students. Prior

³³ Nelson, James E., "Recent Congressional Action and the New Legislation," discussion presented at Short-Term Training Program for Student Financial Aid Administrators and Other Student Assistance Personnel, Idaho State University, Pocatello, Idaho, July 10, 1972.

research by Brvan and Erickson,³⁴ for example, indicates that there is a discrepancy between students' educational aspirations and plans: a high school student may aspire (desire or like) to go to college, but he does not plan (expect or intend) to do so for various reasons. At this point, it is a moot question to be answered by empirical procedures if the provision of financial aids might have an impact upon the fulfillment of student aspirations for college attendance. Kimball³⁵ has taken a step in this direction in finding that the availability or absence of small scholarships does not alter students' educational plans; but Elton and Rose³⁶ suggest that the granting of scholarships is related to previously defined levels of academic ability (i.e., the traditional scholastic approach to providing college accessibility). Empirical data should be conducted to determine the impact of more recent financial aid programs and packages; future trends in financial aid shall demand that this sort of evaluative research be done.

Many of the issues which have been discussed in this section were the focal concerns of various discussions and presentations proffered in the short-term training program. These issues, defined by perusing the available relevant literature, provided the basis for the items included in the questionnaires filled out by the program participants. The procedures employed for the program evaluation are described in Chapter Two and the findings are presented and discussed in Chapter Three.

³⁴Brvan, Clifford E., and Erickson, Edsel L., "Forecasting Student Dropout: The Utility of Academic Aspirations and Plans," Education and Urban Society, 2:4, (August 1970), pp. 433-458.

³⁵Kimball, Roland B., "No Scholarship Help?," op. cit.

³⁶Elton, Charles F., and Rose, Harriet A., "Personality Characteristics of Male Scholarship Recipients," College Student Personnel, 8:4, (July 1967), pp. 261-264.

CHAPTER TWO

METHODOLOGY

In this chapter, information is presented concerning various characteristics of the participants, the location and the facilities in which the training program was conducted, the procedures employed for the collection of the data, and the types of statistics which were used for analysis.

Site of the study

The training program for the financial aid administrators and other student assistance personnel was held at Idaho State University in Pocatello, Idaho. Most of the presentations and discussions were conducted in two large conference rooms located in the Idaho State University Student Union; other informal programs were held in local parks or assumed the form of field trips to various neighboring communities (e.g., migrant labor camps, the Fort Hall Reservation, etc.). The participants were housed in a campus dormitory and were fed in the Student Union Building; therefore, it can be said that the program was structured in such a manner that very close and intensive group interaction was ensured throughout the two week period.

Sample

It was originally intended that the program participants would consist of experienced financial aid officers located in the Region X area. When invitations were sent out, however, it was discovered that

the majority of these persons had attended similar workshops sometime during the past two years period. Furthermore, these persons suggested that new personnel in their own offices would be more likely to benefit from the short course training program. Consequently, the list of prospective participants was expanded to include inexperienced as well as experienced financial aid officers throughout Region X and VIII. As a result, there were nine participants with no experience at all in financial aid administration, eight persons with less than one year of working experience, fifteen who had worked from one to three years, and only one with more than four years of experience. This diversity of job-related experience worked to enhance the interaction of the participants - the climate of opinion ranged from expressions of idealism by the beginners to that of the hardened pragmatist.

In addition to work experience, there were several other differences among the group participants. The age distribution ranged from 20 to over 50 years of age; the modal age fell somewhere between 26 and 35 (N = 19). One fourth of the participants were females. There was a scattered representation of chicanos, Indians and blacks, but the majority were white.

The educational backgrounds varied considerably. Of the 36 participants, 39 percent had majored in one of the areas of the social sciences; 25 percent had majored in education; 22 percent had been educated in either business or accounting; and 14 percent had received their training in the physical sciences. Six persons had not yet acquired a B.A. and one person had received a Ph.D. The largest majority held M.A. degrees (44 percent) and 36 percent held at least

a B.A. degree. The vast majority of the respondents (83 percent) planned to continue their formal educational training. Their salaries ranged from \$5,000 to over \$17,000 per year; the average income fell between \$9,000 and \$11,000.

The majority of the participants resided in the geographical area which includes Washington, Idaho, Utah and Montana (58 percent); 33 percent were from the Dakotas, Colorado or Alaska; and the remainder were from Pennsylvania and New York. The largest percentage of participants (50 percent) worked in four-year public colleges and universities; 24 percent were employed in public junior colleges; 15 percent in private four-year colleges; nine percent in private junior colleges; and two percent were employed by vocational-technical schools.

While 30 percent of the respondents stated that they held no additional positions other than that of financial aid officers, 34 percent indicated that they maintained additional teaching or administrative duties. Twenty-six percent served as counselors in addition to their financial aid administration duties and an additional ten percent held other various additional positions.

The program participants had been employed in a number of diverse occupational areas prior to their becoming financial aid officers. Approximately 42 percent of the respondents had taught school or were directly involved in the field of education. Seventeen percent had been employed in business or accounting; eleven percent came from clerical or sales work backgrounds and the remaining 30 percent were either involved in unskilled labor or had been students prior to their entry into financial aids. These figures correspond to those

found by Casazza³⁸ which indicate that a large percentage of financial aid officers are drawn from the fields of education and business.

Procedures

The findings of this study are primarily based upon a pre-test, post-test, and participant observation procedures. The general intent of the pre-test was to ascertain various attitudes and opinions of respondents prior to the workshop. The pre-test consisted of questions designed to elicit standard biographical data on each participant, 45 attitudinal items constructed on a Likert-type scale (responses ranged from 1 to 5, with 1 = Strongly Agree; 5 = Strongly Disagree), and six open ended questions (See Appendix B). This questionnaire was mass-administered on the first day of the program. Due to the fact that many of the participants were inexperienced on the job, it was anticipated that this would be their first exposure to several factors that the questionnaire was designed to assess. For this reason, it was expected that the answers to several questions would consist of "Don't Know" and "Undecided" responses.

After the first week of the program, a mid-term evaluation was also conducted (See Appendix C). The basic purpose of this questionnaire was to provide feedback to the program directors by assessing participant reaction to various discussions, presentations, field trips, etc. The respondents also expressed various suggestions and ideas for the types of approaches that they desired for the following week. Since this particular instrument was employed as a feedback mechanism, it is not

³⁸Casazza, Clarence L., "Career Patterns of Financial Aids Directors," The Journal of Student Financial Aid, 1:2 (November 1971), p. 34.

used for extensive analysis in this report--the reactions of the respondents to various aspects of the program are presented in Tables 5 and 6 in Chapter Three.

The post-test consisted once again of various attitudinal items--the same questionnaire and the same techniques were employed as in the pre-test (See Appendix B). In this manner, it was intended to measure group attitudinal changes which might be attributed to the impact of the workshop. The participants, who were generally very cooperative with the research investigators, were entreated to answer as thoughtfully and honestly as possible. Hence, the reliability and validity of these scales must be accepted at face value and are, perhaps, a function of the integrity of the respondents. At the same time, a second instrument assessed reactions of participants to the content of the previous week's presentations and solicited suggestions for future programs. These responses are presented in Tables 5 and 6 in Chapter Three.

The primary data collection instruments--the pre-test and the post-test were designed to assess attitudes and opinions about certain social and political issues involved in the field of financial aid administration. The project directors had also constructed a knowledge and information inventory (see Appendix D) which was also administered. This particular instrument was intended to assess certain cognitive rather than affective factors.

The information from the basic data collection instruments was coded and punched on IBM cards. The analysis was conducted with the help of the personnel at the Idaho State University Computer Center. The majority of the findings are based upon percentages and frequency distributions so that the reader may more easily interpret them. Where

necessary, correlation matrices, contingency coefficients and other appropriate parametric and non-parametric statistics have been employed.

CHAPTER THREE

FINDINGS

In this chapter, the attempt has been made to employ rather simple statistics and a low-level, straight-forward type of analysis in order to facilitate interpretation for a reading audience with a diverse background in terms of simple percentage and frequency distributions. In general, the major concern is focused upon the attitudinal changes as assessed by the pre- and post-test questionnaire (See Appendix B). One of the problems in analysis revolved around the fact that three persons dropped out of the program or else did not fill out the second questionnaire. This must be kept in mind while reading and interpreting the results, for this amounts to a nine percent dropout rate; this difference in the pre- and post-test population must be accounted for in interpreting the findings.

In order to determine whether any attitudinal differences assessed might have been statistically significant, two different statistical tests were used to analyze every questionnaire item: the chi-square (χ^2) and the t-test. The results of these tests are reported in each of the following tables.

One of the first things that was asked of the participants in the program concerned what might be termed "Job Satisfaction" (See Appendix B, Items 15 and 16). The questionnaire items, the distribution of responses

and the results of the χ^2 and t-test analyses are presented in Table 1.

As may be seen in Table 1, there was a change in the degree in which the participants expressed satisfaction with their jobs. Very few are undecided, and during the post-test, no one expressed dissatisfaction with their jobs. The major shift occurred among these people who had "strongly agreed" that they were satisfied with their jobs at the beginning of the session and who then changed to "agree," perhaps implying that their convictions had been somewhat altered. At this point, little can be said as to why there was a reduction in the strength of expressed satisfaction other than perhaps some of the participants may have been led to question their past performance on the job. As indicated in the various statistical tests employed, there was no shift in the mean responses and the results of the χ^2 and t-test analyses were not significant. Hence, although there were some changes which occurred over the two-week training period, the changes were not statistically significant.

The majority of the persons in the program were quite undecided about whether to continue in their present jobs as a career. Again, the changes in this attitude were insignificant--both statistically and socially--throughout the two-week period. This particular response, however, probably typifies the majority of the working population in any vocational setting.

As noted, there was a slight reduction in the degree to which the participants expressed satisfaction with their present jobs. A series of questions were addressed to assess these people's perceptions of the role and the responsibilities of the financial aid officer. In Table 2, the questionnaire items and the responses are presented along with the results of the statistical tests. The questionnaire items have been

Table 1. Indications of Job Satisfaction: Financial Aid Officers and Other Student Assistance Personnel.

	Strongly Agree	Agree	Don't Know Undecided	Disagree	Disagree	\bar{X}	χ^2	t-test
I am generally satisfied with my job.								
Pre-test	42% (15)	47% (17)	9% (3)	3% (1)	0	1.7		n.s.
Post-test	30% (10)	64% (21)	6% (1)	0	0	1.7	n.s.	n.s.
I think I will make my present job a life-time career.								
Pre-test	11% (4)	17% (6)	50% (18)	14% (5)	9% (2)	2.9		
Post-test	9% (3)	15% (5)	61% (20)	15% (5)	0	2.8	n.s.	n.s.

Table 2. Perceptions of the Job Role and Responsibilities of the Financial Aid Officer

Primary Functions	Strongly Agree	Agree	Don't Know Undecided	Disagree	Strongly Disagree	\bar{X}	χ^2	t-test
The primary function of a financial aid officer is to assist students in obtaining financial assistance.								
Pre-test	55% (20)	42% (15)	0	3% (1)	0	1.5	n.s.	n.s.
Post-test	33% (11)	55% (18)	0	12% (4)	0	1.9		
The primary function of the financial aid officer is to counsel students in the use of programs which are designed to help them.								
Pre-test	46% (16)	51% (18)	3% (1)	0	0	1.6		
Post-test	12% (4)	64% (21)	15% (5)	9% (3)	0	2.2	.05	.01
The position of a financial aid administrator is primarily a student service.								
Pre-test	51% (18)	37% (13)	3% (1)	9% (4)	0	1.7		
Post-test	33% (11)	67% (22)	0	0	0	1.7	n.s.	n.s.
The job of a financial aid officer is primarily administrative.								
Pre-test	3% (1)	43% (15)	15% (5)	34% (12)	6% (2)	3.0		
Post-test	0	27% (9)	18% (6)	40% (13)	15% (5)	3.4	n.s.	n.s.

Table 2. (Continued)

	Strongly Agree	Agree	Don't Know Undecided	Disagree	Strongly Disagree	\bar{X}	χ^2	t-test
<u>Understanding of Job</u>								
I feel that the work of a financial aid administrator is very important.								
Pre-test	72% (26)	28% (10)	0	0	0	1.3		
Post-test	67% (22)	33% (11)	0	0	0	1.3	n.s.	n.s.
The administration of financial assistance can be properly accomplished only by financial aid officers.								
Pre-test	14% (5)	36% (13)	14% (5)	33% (12)	10% (1)	2.8		
Post-test	27% (9)	58% (19)	0	12% (4)	3% (1)	2.0	.05	.01
It has never been explained to me just what the scope and responsibilities of a financial aid administrator should be.								
Pre-test	6% (2)	27% (10)	6% (2)	52% (19)	9% (3)	3.3		
Post-test	3% (1)	27% (9)	9% (3)	49% (16)	12% (4)	3.4	n.s.	n.s.

Table 2. (Continued)

	Strongly Agree	Agree	Don't Know Undecided	Disagree	Strongly Disagree	\bar{y}	χ^2	t-test
<u>College and University Relationships and Responsibilities</u>								
University administrators have too much control over financial aid procedures and regulations.								
Pre-test	9% (3)	14% (5)	31% (11)	41% (15)	6% (1)	1.7	n.s.	n.s.
Post-test	9% (3)	24% (8)	21% (7)	42% (15)	3% (1)	1.1		
The administration of financial aids should be kept separate from other areas of college administration.								
Pre-test	9% (3)	25% (9)	9% (3)	50% (18)	9% (3)	3.3	n.s.	n.s.
Post-test	12% (4)	17% (6)	0	51% (16)	20% (7)	3.4		
Financial aid administrators should become more involved in recruiting disadvantaged students.								
Pre-test	38% (14)	44% (16)	17% (6)	0	0	1.7		
Post-test	34% (12)	54% (19)	6% (2)	0	0	1.8	n.s.	n.s.

Table 2. (Continued)

	Strongly Agree	Agree	Don't Know Undecided	Disagree	Strongly Disagree	\bar{X}	χ^2	t-test
Financial aid administrators should continue to give aid to those who fail to meet academic requirements during their first year in college.								
Pre-test	17% (6)	31% (11)	36% (13)	11% (4)	6% (2)	2.6		
Post-test	27% (8)	40% (13)	12% (4)	24% (8)	0	2.4	n.s.	n.s.
Financial aid administrators should not concern themselves with the total amount of indebtedness that a student incurs in obtaining an education.								
Pre-test	3% (1)	3% (1)	3% (1)	47% (17)	44% (16)	4.3		
Post-test	0	0	0	55% (18)	45% (15)	4.6	n.s.	n.s.
There is a definite need for more "humanization" in the financial aids profession.								
Pre-test	40% (14)	34% (12)	17% (6)	9% (3)	0	1.9		
Post-test	36% (12)	52% (17)	6% (2)	6% (2)	0	1.9	n.s.	n.s.
Many of the things that I have to do in my job go against my better judgment.								
Pre-test	9% (3)	20% (7)	9% (3)	55% (20)	9% (3)	3.4		
Post-test	6% (2)	15% (5)	18% (6)	51% (17)	9% (3)	3.4	n.s.	n.s.

Table 2. (Continued)

State of the Discipline	Strongly Agree	Agree	Don't Know Undecided	Disagree	Strongly Disagree	\bar{X}	χ^2	t-test
There is a definite need for specific academic or credential requirements to upgrade the profession.								
Pre-test	6% (2)	36% (13)	33% (12)	20% (7)	6% (2)	2.8	n.s.	.01
Post-test	6% (2)	49% (16)	18% (6)	24% (8)	3% (1)	2.7		
There should be more rigorous standards for financial aid officers.								
Pre-test	11% (4)	26% (13)	28% (10)	20% (8)	6% (2)	2.7		
Post-test	12% (4)	49% (16)	24% (8)	15% (5)	0	2.4	n.s.	n.s.
The best way to obtain the needed knowledge for financial aid administration is on-the-job training.								
Pre-test	33% (12)	47% (17)	11% (4)	9% (3)	0	1.9		
Post-test	24% (8)	46% (15)	15% (5)	15% (5)	0	2.2	n.s.	n.s.
There is little agreement among financial aid officers with respect to national goals.								
Pre-test	3% (1)	20% (7)	42% (15)	33% (12)	3% (1)	3.1		
Post-test	0	27% (9)	27% (9)	36% (12)	9% (3)	3.3	n.s.	n.s.

Table 2. (Continued)

	Strongly Agree	Agree	Don't Know Undecided	Disagree	Strongly Disagree	\bar{X}	χ^2	t-test
A National Code of Ethics should be developed for financial aid administrators.								
Pre-test	20% (7)	57% (20)	17% (6)	3% (1)	3% (1)	2.1		
Post-test	12% (4)	61% (19)	12% (4)	10% (3)	3% (1)	2.3	n.s.	n.s.
There is a definite lack of adequate workshops, programs and seminars for financial aid officers.								
Pre-test	17% (6)	31% (11)	28% (10)	25% (9)	0	2.6		
Post-test	45% (15)	40% (13)	12% (4)	3% (1)	0	1.7	.05	.01

classified into four categories: (1) Primary Functions; (2) Understanding of the Job; (3) College and University Relationships and Responsibilities; and (4) State of the Discipline.

A visual inspection of the data presented in Table 2 indicates that very few of the statistical analyses yielded statistically significant differences between the responses which were elicited during the pre-test and the post-test. Consequently, the discussion of these questionnaire items can be focused upon various apparent changes in the percentage and frequency distributions of responses.

As previously mentioned, the questions and the responses have been broken into four sub-categories in Table 2. The following discussion is based upon each category.

Primary Functions. In Table 2, the first four questions deal with the participants' perceptions of the primary functions and responsibilities of the financial aid administrator. As may be seen from the distribution of responses, the majority of the participants at the beginning of the program felt that the primary function of a financial aid officer is to assist students in obtaining financial assistance. At the end of the training session, however, the participants were somewhat less likely to "strongly agree" about this aspect of the role--and a few even disagreed with this item. The difference, however, was not statistically significant.

Similarly, the majority of the respondents initially agreed that the primary function of the financial aid officer is to counsel students in the use of programs which are designed to help them. At the end of the program, however, the strength of agreement with this item was reduced; a few more were undecided about this issue, and three participants

disagreed. The attitudinal changes along this dimension were statistically significant with both the χ^2 and t-test analyses.

On the third item, only five persons were not in agreement with the statement that the position of a financial aid administrator is primarily a student service; at the beginning of the program, 51 percent of the respondents strongly agreed with this statement. At the end of the program, however, the strength of agreement was again diminished; but all were essentially in agreement. The difference was not statistically significant.

At the beginning of the program, there was a decided difference of opinion regarding the statement that "The job of the financial aid officer is primarily administrative." About 46 percent of the respondents agreed; 40 percent disagreed; and 15 percent were undecided. Differences in opinion on this item may partially reflect the size and structure of the respondents' own work setting, i.e., whether or not there are several employees working at different jobs in the financial aid offices which might call for supervisory administration. At the end of the program, there was a slight shift with the majority of the respondents, 55 percent, disagreeing with this statement. The difference, however, was not statistically significant.

Implications--Primary Functions. On four items designed to assess the participants' perceptions of the primary functions of financial aid administrators, there was an observable general trend. At the beginning of the program, the respondents were more likely to "strongly agree" that the primary responsibilities of financial aid officers were to (1) assist students in obtaining financial assistance, (2) counsel students in the use of programs which are designed to help them, and (3) be a type of

student service. At the end of the program, although the majority of the participants still were essentially in agreement with the statement, the strength of agreement was somewhat reduced. This is in line with the philosophies expressed in the review of the literature that the role of the financial aid officer should be multi-oriented, i.e., directed toward the community and the school as well as to the student, and that there are several different functions that financial aid administrators should emphasize equally. In this respect, then, it may be said that the general trends of the participants' responses on the post-test questionnaire indicate that the short-term training program was successful in this area.

Understanding of Job. The second group of items found in Table 2 deals with the participants' understanding of the importance of the job of the financial administrator. In response to the item "I feel that the work of a financial aid administrator is very important," the majority of the participants strongly agreed both before and after the training program. The changes in the distribution of responses were insignificant both generally and statistically.

Half of the participants were in doubt at the beginning of the program about the statement that "The administration of financial assistance can be properly accomplished only by financial aid officers." These persons apparently felt that there might be other agencies which could perform this function just as well as financial aid administrators. At the end of the program, however, nearly all participants, 85 percent, were in agreement with both the χ^2 and t-test analyses. In other words, most of the participants left the program convinced that it does require a separate and distinct occupational role to properly administer financial aid to college and university students.

On the other hand, nearly one-third of the respondents agreed, both before and after the program, that the scope and the responsibilities of a financial administrator had never been explained to them. This implies that the participants, although convinced of the importance of the job, were still somewhat uncertain about what exactly should and should not be attempted in that capacity.

Implications--Understanding of Job. At the end of the program, the participants were generally in rather strong agreement that the work of a financial aid officer is important; and those who were initially in doubt about the necessity of the role of a financial aid officer came away convinced that this particular occupational role is essential for the proper administration of student financial aid. On the other hand, nearly one-third of the participants declared, both before and after the training program, that the scope and the responsibilities of a financial aid officer had not been fully explained to them. This is a problem that should be the topic of discussion in future workshops and programs; the answer, however, may be slow in forthcoming. The occupational role of a financial aid officer is quite likely to vary a great deal from one academic setting to another; the present boundaries which might delineate the scope and nature of responsibilities are probably a function of highly divergent rules and regulations imposed by various federal, state, regional and local agencies. As indicated in the review of the literature, the financial aid officer may or may not be expected to function as a recruiter, as an arm of the business office, as a counselor, etc. The development of this particular discipline is as of yet too new for the formal specification of the scope and responsibilities of the role incumbent. Therefore, it can be currently concluded that it would be

rather presumptuous for the directors of any workshop to attempt to spell out the "scope and responsibilities of a financial aid administrator," but this particular area should be the subject of discussion in future workshops.

Relationships and Responsibilities to the University. The next series of items can be classified as participant perceptions of the occupational relationships and responsibilities of the financial aid officer within the university setting. As seen in Table 2, during the pre-test, less than one-fourth of the participants (23 percent) agreed with the statement that university administrators have too much control over financial aid procedures and regulations; nearly one-third (31 percent) were undecided or did not know; and nearly one-half (47 percent) disagreed. At the end of the session, there was a slight shift--generally from the "Don't Know" response to one of agreement. The difference, however, was not statistically significant. Over one-fifth of the respondents (21 percent) were still undecided about this issue at the end of the training program.

The responses to this question correspond with those to the second, i.e., "The administration of financial aids should be kept separate from other areas of college administration." At the beginning of the session, 34 percent agreed with this statement; at the end of the program, 39 percent were in agreement. The large majority of the participants disagreed with this notion both before and after the program. The responses to these two items suggest that the participants generally felt that the administration of financial aids should be conducted in conjunction with other areas of college administration and that the amount of control that university administrators have over the administration of financial aids

is not generally viewed as a problem.

In fact, as is seen in the third item, the largest majority of the participants feel that they should play a part in an area which has traditionally been within the realm of a separate area of college administration--that of recruiting students. This was true both before and after the program, and there was a slight tendency for more participants to agree with this statement at the end of the workshop. The difference, however, was not statistically significant.

Three items were addressed toward participants' views of the responsibilities that they feel they should have regarding student clients. As was discussed in the above paragraph, most of the participants believed that they should become involved in recruiting needy students, but there is the additional question of what responsibilities the financial aid officer should have once that the students are actually enrolled. Obviously, it must be assumed that many disadvantaged students will have various problems during the first year of college; hence, the question was asked, "Financial aid officers should continue to give aid to those who fail to meet academic requirements during their first year in college." At the beginning of the session, less than half of the participants (46 percent) agreed with this statement; over one-third (36 percent) were undecided, and 17 percent disagreed. At the end of the two-week period, 67 percent were in agreement with this position, only 12 percent were undecided; but almost one-fourth (24 percent) disagreed. The changes in the responses, however, were not statistically significant. A visual inspection of the frequency distribution indicates that the majority of those who were initially in doubt about this policy tended to agree with this statement at the end of the program. Two

persons, however, became more negative toward this practice.

A third item dealing with perceptions of the responsibilities that financial aid officers should have for student clients concerned the amount of indebtedness that a student might accumulate during his college career. Nearly all of the participants initially disagreed with the statement that financial aid officers should not concern themselves with the total amount of a student's indebtedness; at the end of the two-week session, 100 percent of the participants disagreed (three, however, had dropped out of the program--at the beginning of the workshop, there were only three who were not in disagreement with this statement).

The majority of the respondents (74 percent) agreed at the beginning of the program that there is a need for more "humanizaation" in the financial aids profession. At the end of the session, 88 percent agreed with this questionnaire item. Two persons were as of yet undecided, and only two persons disagreed. The change in this attitude was again statistically insignificant.

Finally, in dealing with the participants' perceptions of the responsibilities and the scope of the role of the financial aid officer, it was asked of them to indicate the extent of their agreement with the statement, "Many of the things that I have to do in my job go against my better judgement." At the beginning of the program, 64 percent of the participants disagreed with this statement and 29 percent were in agreement. At the end of the session, only 21 percent agreed, 60 percent disagreed and six persons were undecided. From these responses, it might be concluded that the financial aid officers feel that they possess a considerable degree of autonomy and that they can generally perform their roles in the manner that they feel is appropriate.

Implications--Relationships and Responsibilities to the University.

For the most part, it appears as if the participants in the short-term training program are generally satisfied in the kinds of relationships which exist between their offices and the other areas of university and college administration. The majority of the respondents feel that the administration of financial aids should not be kept separate from other areas of college administration; they generally do not feel as if other university administrators have assumed an undue amount of control over the procedures and regulations of financial aid; and, in general, they feel as if they are able to operate in accord with their own better judgment in the performance of their role.

An overwhelming majority of them feel as if they should become even more involved in the recruiting of disadvantaged students--but nearly one-fourth of them would feel no obligation to remain committed to financing such a student if the first year in college resulted in failure. On the other hand, the respondents were unanimous in their opinion that they should be concerned with the amount of indebtedness that students might accrue in pursuing a higher degree in education.

Such implications as can be derived from these findings speak well both of the participants and of the general success of the two-week program. Although the changes in attitudinal responses were not found to be statistically significant for any of the items in this section of the questionnaire, the general trends in the distribution of responses indicate a definite and consistent tendency that the program directors did attain the desired objectives of the workshop.

State of the Discipline. The final series of questions presented in Table 2 were intended to assess the participants' opinions of the current

state of the financial aid profession.

The first question was as follow : There is a definite need for specific academic or credential requirements to upgrade the profession. At the beginning of the session, 42 percent of the respondents agreed, 26 percent disagreed, and one third were undecided. At the end of the session, over half (54 percent) agreed, 27 percent disagreed and 19 percent were undecided. Using the t-test, there was a statistically significant change in responses at the .01 level of significance; this was not duplicated with the χ^2 analyses. The general shift in responses, however, is indicative of a definite trend in consensus that specific academic or credential requirements are in order to upgrade the profession of financial aids administration.

Further support for this opinion was indicated by the responses elicited by the question, "There should be more rigorous standards for financial aid officers." While only 37 percent of the participants agreed with this statement at the beginning of the session, 51 percent were in agreement at the conclusion of the workshop. Nearly one-fourth of the respondents were undecided both at the beginning and at the end of the two-week session. Nine persons disagreed at the beginning; five disagreed at the end--but it must be remembered that there were three who dropped out of the workshop prior to its completion.

On the other hand, there is a problem suggested in terms of the best way to upgrade the profession or as to the method to be used to exact more rigorous standards; the majority of the respondents felt that the best way to obtain the needed knowledge for financial aid administration is on-the-job training. At the beginning of the workshop, 80 percent of the participants expressed this belief, and 70 percent felt this was the

case at the end of the two week program. One limitation of this questionnaire in the evaluation is that it did not provide the opportunity for qualitative responses which might suggest other ways in which this training could be obtained. At present, on-the-job training is perhaps the best method by which persons can learn the skills and knowledge needed for the job; since it is the only way, it must obviously be the "best way" at present.

On the final question, "There is a definite lack of adequate workshops, programs, and seminars for financial aid officers," 53 percent stated during the pre-test that this was not the case or that they did not know (or were undecided). The post-test indicated a statistically significant change in this opinion. During the pre-test, 48 percent stated that there were not enough of such programs, but in the post-test, 85 percent indicated the need for similar activities. This change was statistically significant with both the χ^2 and t-test. In other words, as a result of the workshop, there was created within the participants a great deal of support for such endeavors as well as a recognition for such approaches within the field. This change may be partially explained by the fact that 58 percent of the respondents had never participated in a workshop before and that there was a great deal of information presented that was beneficial. This would appear to be a very positive impact of the total program and indicates the need for more and improved workshops for financial aid officers in the future.

Another effect of the program is indicated by the changing responses to the questionnaire item "There is little agreement among financial aid officers with respect to national goals." There does appear to be some type of prevalent climate of opinion regarding national goals, at least

among those who participated in the short-term workshop. The shifts in the attitudes assessed by this measure were insignificant--the biggest shift occurred among those who were initially undecided or did not know. At the beginning of the program, nearly one-half of the participants (47 percent) were undecided about the extent of agreement regarding national goals; at the end of the program, this was reduced to 27 percent. At the beginning of the session, 36 percent of the respondents disagreed; at the end of the session, 45 percent were in disagreement with this item. For the most part, it can be concluded that there is a kind of general consensus about which national goals are to be served by financial aid officers--and the short-term training program served to highlight these goals for those who were in doubt.

The fact that these goals and the means for achieving them should perhaps be formalized is indicated by the responses to the questionnaire item: "A National Code of Ethics should be developed for financial aid administrators." At the beginning of the program, 77 percent of the respondents subscribed to this notion; at the closing of the workshop, 73 percent felt that this should be the case. Only four persons expressed disagreement about the necessity of a National Code of Ethics.

Implications--State of the Discipline. It has been found that a slight majority of the short-term program participants feel that there is a need to have specific academic or credential requirements to upgrade the financial aid profession and that there should be more rigorous standards for financial aid administrators. At the end of the workshop, the respondents were considerably more likely to be supportive of these notions than they were during the first day of the program. The vast majority of participants feel that the best way to obtain the needed

knowledge for financial aid administration is through on-the-job training, but this might be because this is perhaps the only available avenue for learning the trade. There was a definite feeling among the participants that the use of short-term training programs and workshops is a worthwhile endeavor. At the beginning of this workshop, less than one half of the respondents felt that such enterprises were really necessary--at the conclusion of the program, fully 85 percent felt that there is a definite need for such programs in the field of financial aids. Again, at the end of the program, the participants were more likely to agree that there is some consensus among financial aid officers with respect to national goals; but there seems to be some necessity of formalizing such goals, for they expressed the feeling that there should be some type of National Code of Ethics for financial aid officers.

From such findings, it can be said that some of the immediate effects of the short-term training program are that it did serve to promote a kind of attitudinal and philosophical consensus among the participants; it certainly worked to make them considerably more appreciative of the kinds of educational innovations and intervening attempts which might be able to enhance their own efficiency and job success; and it appears to have posed the question of professional ethics in the field. There is a pervasive feeling among the respondents that the discipline should be upgraded somehow--but there appear to be few programs currently available which might do this; consequently, on-the-job training is about the only type of training which is generally provided. The identification of these kinds of issues would seem fruitful topics of discussion in future workshops and training programs. There does seem to be a need for pre-service, in-service, and other programs

such as the workshop conducted at Idaho State University. The participants would seem to be unanimous in their agreement on this point.

In Table 3, data are presented pertinent to the program participants' perceptions of various Academic Issues and Social Problems. The questionnaire items and the responses are again broken down into several sub-categories: (1) their perceptions of the student's own responsibilities for financing an educational career; (2) their perceptions of administrative problems in the field of financial aid; (3) their perceptions of problems regarding minority students and disadvantaged students. On the following pages, each of these sub-categories shall be discussed separately.

In examining Table 3, it is once again apparent that very few of the post-test responses differed from the pre-test answers as is generally measured by tests of statistical significance. On the other hand, there are a number of shifts in the frequency distribution which do merit discussion.

Perceptions of the Students Own Responsibilities. The first four questions deal with the program participants' perceptions of the responsibilities that students themselves should bear with respect to financial aid and economic resources. The first questionnaire item was "Individuals who receive aid should be required to work during the summer if they are not attending classes." The majority of the financial aid officers and other student assistance personnel were rather strongly in agreement with this notion both before and after the two week program. The changes in the extent of agreement or disagreement were not statistically significant, and the change in the frequency distributions for this item are not particularly noteworthy.

Table 3. Perceptions of Academic Issues and Social Problems: Financial Aid Officers and Other Student Assistance Personnel.

Perceptions of Students' Own Responsibility for Financial Aids						
	Strongly Agree	Agree	Don't Know/Undecided	Disagree	Strongly Disagree	\bar{X} χ^2 t-test
Individuals who receive aid should be required to work during the summer if they are not attending classes.						
Pre-test	11% (4)	44% (16)	14% (5)	28% (10)	3% (1)	2.7
Post-test	6% (2)	45% (15)	21% (7)	24% (8)	3% (1)	2.7 n.s. n.s.
A student who is not willing to work for the financial aid that he receives does not deserve a college diploma.						
Pre-test	3% (1)	31% (11)	9% (3)	36% (13)	2% (1)	3.4
Post-test	3% (1)	13% (6)	18% (6)	50% (16)	1% (1)	3.4 n.s. n.s.
Most students are pretty well informed about the appropriate type of financial assistance which is available to them.						
Pre-test	0	0	0	58% (21)	42% (15)	4.4
Post-test	0	0	2% (2)	54% (18)	44% (15)	4.3 n.s. n.s.

Table 3. (Continued)

	Strongly Agree	Agree	Don't Know Undecided	Disagree	Strongly Disagree	\bar{X}	χ^2	t-test
A student who applies for financial aid should be willing to accept whatever might be available.								
Pre-test	6% (2)	42% (15)	25% (9)	22% (8)	6% (2)	2.8		
Post-test	0	42% (14)	12% (4)	39% (13)	6% (2)	3.0	n.s.	n.s.
Perceptions of Administrative Problems in Financial Aids								
Because of the heavy burden on financial aid officers, students who are late for appointments should be made to come back at a later date.								
Pre-test	3% (1)	17% (6)	17% (6)	50% (18)	14% (5)	3.6		
Post-test	9% (3)	0	15% (5)	65% (21)	12% (4)	3.7	n.s.	n.s.
A major problem facing financial aid officers is that of reducing the amount of paperwork for students.								
Pre-test	23% (9)	50% (18)	9% (3)	14% (5)	3% (1)	2.2		
Post-test	21% (7)	48% (16)	12% (4)	18% (6)	3% (1)	2.2	n.s.	n.s.

Table 3. (Continued)

	Strongly Agree	Agree	Don't Know Undecided	Disagree	Strongly Disagree	\bar{X}	χ^2	t-test
One of the best measures of the successful financial aid program is the number of students who graduate under the program.								
Pre-test	0	33% (12)	17% (6)	39% (14)	11% (4)	3.3		
Post-test	3% (1)	31% (10)	31% (10)	25% (8)	9% (3)	3.1	n.s.	n.s.
The best criterion for determining whether to grant aid to a student is his past academic success.								
Pre-test	3% (1)	3% (1)	6% (2)	42% (15)	47% (17)	4.3		
Post-test	0	0	0	64% (21)	36% (12)	4.3	n.s.	n.s.
Perceptions of Administrative Problems in Financial Aids								
Most college administrators and faculty don't understand the job requirements and responsibilities of F.A.C.								
Pre-test	42% (15)	42% (15)	17% (6)	0	0	1.8		
Post-test	64% (21)	36% (12)	0	0	0	1.4	n.s.	.01
Most college administrators and faculty don't understand the importance of financial aids.								
Pre-test	33% (12)	50% (18)	17% (6)	0	0	1.2		
Post-test	52% (17)	48% (16)	0	0	0	1.4	n.s.	n.s.

Table 3. (Continued)

Perceptions of Problems with Minority and Disadvantaged Students						
	Strongly Agree	Agree	Don't Know / Undecided	Disagree	Strongly Disagree	\bar{x} χ^2 t-test
Many students with deficient educational backgrounds should be given grants and reduced course loads.	194 (7)	504 (18)	174 (6)	144 (5)	0	1.9
	164 (6)	504 (19)	174 (4)	174 (4)	0	2.2
						n.s. n.s.
Pre-test						
Post-test						
If we discontinue to finance so many "disadvantaged" students with poor educational backgrounds, we will reduce college standards and impair the progress of the nation.	34 (1)	34 (1)	224 (8)	444 (16)	284 (10)	3.3
	34 (1)	34 (1)	94 (3)	504 (19)	304 (10)	4.1
						n.s. n.s.
Pre-test						
Post-test						
All things being equal, students should be given preference when seeking financial aid.	114 (4)	194 (7)	144 (5)	424 (15)	244 (5)	3.3
	154 (5)	244 (9)	54 (2)	424 (14)	244 (5)	3.3
						n.s. n.s.
Pre-test						
Post-test						

Table 3. (Continued)

	Strongly Agree	Agree	Don't Know Undecided	Disagree	Strongly Disagree	\bar{X}	χ^2	t-test
All other things being equal, a male should receive priority over a female in financial aid.								
Pre-test	0	9% (6)	6% (2)	44% (16)	42% (15)	4.2		
Post-test	0	6% (2)	3% (1)	48% (16)	42% (14)	4.3	n.s.	n.s.
It is more important to aid the poor student than it is to aid the student from a middle class family.								
Pre-test	19% (7)	25% (9)	6% (2)	42% (15)	9% (3)	2.9		
Post-test	21% (7)	33% (11)	18% (6)	24% (8)	3% (1)	2.5	n.s.	.10
There are not enough financial aid programs for middle and upper-class students.								
Pre-test	19% (7)	44% (16)	25% (9)	11% (4)	0	2.3		
Post-test	12% (4)	51% (17)	9% (3)	9% (3)	18% (6)	2.7	.05	n.s.
Attitudes About Human Nature								
Colleges and universities should cease to reform society.								
Pre-test	6% (2)	14% (5)	31% (11)	29% (10)	20% (7)	3.4		
Post-test	6% (2)	18% (6)	30% (10)	33% (11)	12% (7)	3.2	n.s.	n.s.

Table 3. (Continued)

	Strongly Agree	Agree	Don't Know Undecided	Disagree	Strongly Disagree	\bar{X}	χ^2	t-test
Most people who don't get ahead just don't have enough will power.								
Pre-test	3% (1)	14% (5)	9% (3)	50% (18)	25% (9)	3.8		
Post-test	0	9% (3)	18% (6)	55% (18)	18% (6)	3.8	n.s.	n.s.
Most people who do not get ahead simply lack motivation.								
Pre-test	17% (4)	14% (5)	9% (3)	47% (17)	19% (7)	3.5		
Post-test	0	18% (6)	12% (4)	54% (18)	15% (5)	4.6	n.s.	n.s.
Human nature being what it is, there will always be some who are poor and unemployed.								
Pre-test	9% (3)	64% (23)	11% (4)	9% (3)	9% (3)	2.4		
Post-test	12% (4)	64% (21)	6% (2)	9% (3)	9% (3)	2.4	n.s.	n.s.

At the beginning of the program, 34 percent of the participants agreed with the statement that "A student who is not willing to work for the financial aid that he receives does not deserve a college diploma." At the conclusion of the workshop, only 16 percent were of this opinion. Nearly two-thirds of the respondents (62 percent) disagreed with this notion at the end of the program, but the differences in the responses given at the beginning and the end of the two-week session were not statistically significant.

The participants were nearly unanimous in their opinions both before and after the workshop that most students are rather uninformed about the appropriate types of financial assistance which is available to them.

Finally, the statement was presented "A student who applies for financial aid should be willing to accept whatever might be made available." At the beginning of the program, nearly half of the respondents (48 percent) agreed with this notion, 25 percent were undecided, and only 28 percent were in disagreement. At the end of the program, 45 percent disagreed, 42 percent agreed, and four people were still undecided. The changes in attitudes, however, were not statistically significant.

Implications--Perceptions of the Students' Own Responsibilities. It has been found that the program participants tend to feel that students who receive aid should work during the summer if they are not taking classes. This view is held in spite of the fact that most students are quite likely to experience difficulties in obtaining summer work--particularly disadvantaged, lower-class, minority students. During the time, competition for work can become quite fierce--it is a buyer's

market. There is considerable reason to suspect that summer unemployment for the kinds of students who need and receive financial aid may not be of their own choosing in many cases. Financial aid officers, however, will have to take the student applicants' word for this--there will be no supportive documents to indicate that the student applied for and did not receive summer work in most cases. Very often, the minority student or disadvantaged student will find himself in competition with teachers and other professionals in attempting to secure summer employment, even for the more menial kinds of tasks. It is strongly suggested that this kind of student problem be discussed more intensively in future workshops.

While nearly all of the participants agreed that college students do not know very much about what kinds of financial aid programs might be available to them, a considerable proportion of them felt that a student should accept whatever aid is offered. This stands in contrast to the generally pervasive feeling that a student may be deserving of a college degree even though he may not be willing to work for the aid that he received. As indicated in the review of the literature, it is generally the brighter students from the more advantaged social backgrounds who receive scholarships, i.e., financial grants with no work stipulations nor financial indebtedness attached. It is more likely to be the less advantaged student who discovers that he receives financial aid with strings attached, i.e., work or indebtedness. In addition, it is likely to be this type of student who has to work harder to overcome certain deficiencies in his own high school education in order to compete on the college scene. It would appear that these are issues which should be identified and discussed more intensively in future workshops and short-term programs.

Perceptions of Administrative Problems in Financial Aid.

different questions were posed in order to assess the participants' perceptions of the various problems which might be confronted in the administration of financial aid to college students. The results are presented in a separate section in Table 3.

The responses to the first question would indicate that the program participants are quite student-oriented. Again, the two-week program appears to have influenced the respondents. At the beginning of the program, only 20 percent of the participants agreed with the statement that "Because of the heavy burden on financial aid officers, students who are late for appointments should be made to come back at a later date." During the first day of the program, 64 percent of the participants disagreed with this statement; during the final day, 77 percent of them disagreed. This is a shift in a positive direction even though the difference in responses was not statistically significant. These findings indicate that the program participants do indeed place the needs of the students above their own job pressures; even with a heavy schedule, the participants indicate that they would see a tardy client rather than make him come back at a later date.

Again, the financial aid officers in the program demonstrated that they were student-oriented by their responses to the item "A major problem facing financial aid officers is that of reducing the amount of paperwork for students." The largest majority of the program participants agreed with this both before and after the program.

One of the questions which always arises with the introduction of any program which involves the expenditure of money in a socially ameliorative attempt concerns the proper method of evaluation, i.e., what is the

best way to determine if the program is working? As indicated in the review of the literature, the use of certain standardized tests in admissions can result in the selection of students with demonstrated competency. A very selective standard of admission is likely to produce a high rate of successful college program completion and, consequently, reduce the rate of failure. Such a practice is also apt to exclude disadvantaged students with deficient public school backgrounds. With this in mind, the program participants were asked to respond to the following questionnaire item, "One of the best measures of the successful financial aid program is the number of students who graduate under the program." Both before and after the workshop, one-third of the participants agreed with this statement. Fifty percent were in disagreement with this proposition at the beginning of the session, and only 34 percent disagreed at the conclusion of the two-week period. At the end of the workshop, nearly one-third of the participants (31 percent) were uncertain about the feasibility of this measure. This particular item is rather open to interpretation. Naturally, it is the intention of the financial aid program to help students graduate from college; the issue revolves around the practice of selecting or excluding students on the basis of their presumed risk potential. The increase in the proportion of the participants who expressed doubt about the usefulness of graduation as a good measure of program success is probably a healthy sign. The changes in the responses to this particular item over the two-week period were not statistically significant.

The respondents indicated that they are generally quite willing to assume the responsibility for what might be termed "risky" students. At the beginning of the program, the vast majority of respondents (89 percent)

disagreed with the statement that "The best criterion for determining whether to grant aid to a student is his past academic success." At the end of the session, 100 percent of the participants disagreed with this statement (Once again, it must be remembered that there were three dropouts from the program.).

Virtually all of the program participants felt that most college administrators and faculty members are rather ignorant and ill-informed about the job requirements, the responsibilities, and the importance of the administration of student financial aid. Most of the participants felt that this was the case at the beginning of the workshop and they left the I.S.U. campus quite convinced that other college personnel know almost nothing at all about the field of financial aid.

Implications--Perceptions of Administrative Problems in Financial Aids. It has been found that the vast majority of the program participants were quite highly student-oriented. Although the changes in the responses given to various questionnaire items were not statistically significant, there were consistent changes in the distributions of responses which indicate that the two-week training program exerted a very favorable influence along this dimension. The findings indicate that the financial aids personnel are aware of and do empathize with student problems. This is indicated by the fact that most of them felt that a major problem in financial aids consists of reducing the paper work for students; again, the responses given by the participants strongly suggest that they are quite sympathetic toward students--a student who is late for an appointment is likely to be seen when he appears and not be sent away to come back at a later date.

There are at least two different indications that the program participants are not oriented toward the notion of selective admissions as a means of trying to ensure the apparent success of the financial aid program. The vast majority of the respondents stated that they would not use a student's prior academic achievement as the best criterion for determining whether or not to grant financial aid; and there was considerable doubt as to whether or not the best measure of a financial aid program can be assessed by the number of students who graduate under the program. These attitudes indicate that the program participants will not selectively finance only those students who are earmarked for success in the hopes of having favorable evaluations of their program results. These findings speak very well of the program participants and, once again, are indicative of the general success of the workshop.

All of the participants agreed quite strongly that other college administrators and faculty members know little or nothing about the area of student financial aid. This is likely to create problems for administrators, faculty members, financial aids officers, and most particularly, the students. It is probably true that most university departments adhere rather rigorously to a type of boundary maintenance--English professors rarely interact with psychologists, psychologists don't trust sociologists, etc. Such a situation is apt to apply even more strongly to a new discipline based upon a new concept. Faculty members probably learn the functions and responsibilities of financial aid administrators purely on a trial and error basis; financial aid administrators probably tire of reiterating their positions and the scope of their duties to faculty members who only approach them when they are irate and disconcerted about student problems.

It is suggested that future workshops might be expanded to include various faculty members and other university administrators. The current campus relationships between departments and administrative offices could lead to even more misunderstandings, greater misinterpretations, and much more suspicion and distrust unless certain steps are taken to mitigate this type of problem.

Perceptions of Problems with Minority and Disadvantaged Students. As discussed in the review of the literature, there are several different controversies regarding various philosophical, ethical, educational and pragmatic issues regarding the financing and re-financing of various types of students. In an attempt to assess the program participants' views of these issues and any possible changes in their positions which might be attributable, several questions have been asked. These are also presented in Table 3.

The first questionnaire item was "Needy students with deficient educational backgrounds should be given grants and reduced course loads." During the first day of the workshop, 69 percent of the participants agreed, 17 percent were undecided, and 14 percent disagreed. At the end of the training session, 76 percent of the respondents agreed, four persons were undecided and four disagreed. The changes in the responses were not statistically significant. Therefore, it is apparent that the program participants were generally rather sympathetic to the problems that such students might incur on campus given that they are expected to compete with more advantaged students. Although the percentage frequency was higher at the end of the program, the absolute number of people who agreed with this notion remained the same; the higher second percentage frequency is probably attributable to the fact that three persons dropped

out of the program.

Again, the majority of the participants, both before and after the workshop, disagreed with the idea that the financing of disadvantaged students with poor educational backgrounds will reduce college standards. At the beginning of the workshop, 72 percent disagreed with this item; at the end, 88 percent disagreed. The change in the responses was not statistically significant.

Since there are many who declare that there may be a type of "reverse discrimination" which may result in preferential treatment, questions were asked as a means of assessing whether this might occur on an ethnic or sexual basis. As seen in Table 3, the opinions both before and after the workshop were divided with respect to minority groups. In this case, the questionnaire item stated "All other things being equal (need, ability, potential, etc.), minority group members should be given preference when seeking financial aid." During the first day, 30 percent of the participants agreed, 14 percent were undecided, and 56 percent disagreed. On the last day of the program, 34 percent agreed, 54 percent disagreed, and two persons were still undecided. Hence, only about one-third of the participants are likely to give favorable consideration to the racial or ethnic status of applicants given that all other factors are equal among prospective students. The change in the responses over the two-week period was not statistically significant.

In an attempt to discern discrimination on a sexual basis, the questionnaire item stated "All other things being equal (need, ability, potential, etc.), a male should receive priority over a female in financial aid, for the man will be the breadwinner in our society." The respondents were almost in unanimous disagreement with this notion.

both before and after the workshop. On the first day of the program, 86 percent disagreed; on the last day, 90 percent disagreed. The change was not statistically significant.

In order to ascertain the participants' views about students from varying socioeconomic status backgrounds, two more questions were asked. The first item dealt with the participants' priorities for financing lower class versus middle class students, i.e., "It is more important to aid the poor student than it is to aid the student from a middle class family." The changes in the answers given to this item were considerable over the two-week period. During the first day of the workshop, 44 percent of the participants gave poor students more priority than middle class students; 6 percent were undecided, and 51 percent disagreed with this policy. At the end of the program, 54 percent agreed, 18 percent were unsure, and only 27 percent disagreed. This was statistically significant at the .10 level of confidence with the t-test; the χ^2 analysis did not yield statistical significance. On the other hand, the financial aid administrators are not exclusively preoccupied with the educational problems of the poor--for the majority of them also agreed with the statement that "There are not enough financial aid program for middle and upper-class students." During the first day of the program, 65 percent of the respondents agreed with this item and 63 percent agreed at the end of the session. Many of these who were unsure about this factor at the beginning of the session, however, tended to disagree at the conclusion of the program. On the first day, 25 percent were uncertain and 11 percent disagreed; at the end of the session, 9 percent were undecided and 27 percent disagreed. This change was statistically significant with the χ^2 at the .05 level; the t-test, however, did not produce a

statistically significant test.

Implications--Perceptions of Problems with Minority and Disadvantaged Students. In summary, it could be said that the financial aid officers and other student service personnel in the two-week short-term training program had rather mixed reactions regarding minority students and others from disadvantaged backgrounds. Most of them did agree that it was appropriate for needy students from deficient educational backgrounds to receive grants along with reduced course loads; again, most of them felt that this would in no way reduce the academic standards that currently exist in colleges and universities.

On the other hand, it seems unlikely that the financial aid officers in this particular program will extend favorable treatment to a student applicant merely because of racial, ethnic or sexual status. Given that all other factors characterizing potential student applicants are equal, it seems that the financial aid officers would seek other criteria for consideration beyond that of white/nonwhite and male/female variables. The responses to these kinds of questionnaire items do indicate that the financial aid officers are actively attempting to be fair and impartial in the distribution of student financial aid. The initial responses given to such questionnaire items at the beginning of the workshop indicate this to be a rather pervasive tendency among the program participants; the consistent trends in the answers elicited at the end of the session provide testimony to the general success of the entire workshop.

At the end of the workshop, slightly over half of the participants were in agreement that it is more important to aid the poor student than it is the student from a middle class family--the rest disagreed or were uncertain. It would appear that the participants see that they are

involved in a dilemma, however, for most of them also agreed that there are not enough financial aid programs for middle and upper class students. With the introduction of new and greatly expanded financial aid programs, this dilemma in role performance will be considerably resolved. Perhaps one of the greatest implications of these particular findings is that similar research should be conducted in this area after the new financial aid programs have been implemented.

Attitudes About Human Nature. As shown in Table 3, several questions were asked as a means of assessing various basic attitudes concerning the financial aid officers' perceptions of human nature. These particular questions are, to some extent, another means of determining the nature and extent of various types of prejudices which might be operative in relationships that students encounter.

The first questionnaire item is addressed to the role that the colleges and universities should play in society. As discussed in the review of the literature, financial aid officers could be in a powerful, but perhaps dangerous, key position regarding social reform. During the first day, the question was posed, "Colleges and universities should cease trying to reform society." There were 20 percent who agreed to this, 31 percent undecided, and 49 percent who disagree with this notion. On the final day of the program, 22 percent agreed, 30 percent were still undecided, and 45 percent disagreed. The changes in responses were not statistically significant. Hence, both before and after the program, nearly half of the participants felt that the colleges and universities should keep up their efforts regarding social reform, but nearly one-third were uncertain. About one-fifth of the participants felt that this is not an appropriate role for institutions of higher education.

Since the financial aid officer can play a key position in the puzzle of social reform, particular in granting or denying access to college for the poor, three other questions were asked regarding the participants' opinions of the poor. In responding to the first item, "Most people who don't get ahead just don't have enough will power," the majority of the respondents disagreed on both the first and the last day of the program; the percentages of those who disagreed were 75 percent and 73 percent respectively. On the first day, there were 17 percent who agreed and 9 percent who were undecided; on the final day, 9 percent agreed and 19 percent were unsure. The changes in the responses were not statistically significant. In the second item, "Most people who do not get ahead simply lack motivation," the majority of the respondents again disagreed on both testing periods. There were 55 percent who disagreed the first day and 59 percent who disagreed on the last day of the session. Nearly one-third (31 percent) agreed on the first day with 9 percent undecided. During the last day, only 18 percent agreed and 12 percent were unsure. The changes in the responses were statistically insignificant.

In a final assessment of perceptions of human nature, the questionnaire item read, "Human nature being what it is, there will always be some who are poor and unemployed." Somewhat surprisingly, the majority of respondents agreed with this: 75 percent agreed on the first day and 76 percent agreed on the last day of the workshop. During both evaluation sessions, only 18 percent were in disagreement.

Implications--Attitudes About Human Nature. As discussed in the review of related literature, there are many who claim that the colleges and universities can provide a great deal in the area of social change.

Many authors feel that the financial aid officer occupies a central position of importance in this regard: it is he who will often make the ultimate decisions regarding whether various applicants and potential students will have the economic means for attending college and obtaining advanced degrees. To the extent that the financial aid officer might have certain attitudinal biases, both about his role and about the kinds of students that are "worth helping," his role performance is likely to be somewhat modified.

It has been found that only about half of the program participants disagree with the idea that "Colleges and universities should cease trying to reform society." This suggests that many agree with this notion, and it has been found that nearly one-third of the respondents were uncertain--both before and after the program. Persons who are uncertain are also likely to be somewhat uncommitted. If they are uncommitted, it is often because they have not had the opportunity to take a broader look at the problems of society, the use and functions and responsibilities of educational institutions, and even, perhaps, the mutual impact of the relationship that exists between society and institutions of higher learning. This would suggest that such persons should have a somewhat more intensive approach in the identification, definition and examination of social problems, especially those which surround American education and which might be mitigated through education.

The majority of the respondents felt that people who do not get ahead are motivated and do have will power--the lack of these things is not necessarily the cause of a social disadvantaged position. On the other hand, the majority felt that there is perhaps something intrinsic within human nature that ensures that there will always be some who

are poor and unemployed. The high rate of agreement with this notion suggests a major weakness of the evaluation questionnaire. This should have been probed somewhat more extensively. Many authors suggest that poverty and unemployment, for example, are an almost necessary concomitant of extreme forms of capitalism--it is financially expedient to maintain a storehouse of prospective labor; it keeps the forces of labor divided; it keeps prices up and wages down. Many writers suggest that poverty and unemployment can be attributed to the current economic, political and social structure rather than to intrinsic aspects of human nature. In order for financial aid officers to gain more insight into their own role, in order for them to more adequately understand the kinds of social problems that do exist and which should be the subjects for social change, it is suggested that much more emphasis be given to these topics in future programs.

In Table 4, data are presented on questions relevant to the program participants' perceptions of the adequacy of current student financial aid programs.

Perceptions of Adequacy of Current Student Financial Aid Programs.

As seen in Table 4, the responses given during the pre-test and post-test were not sufficiently different to be statistically significant with either the χ^2 or the t-test. The overwhelming majority of the respondents felt that the programs which are currently available are not adequate for meeting the needs of students; the pre-test and post-test responses were 72 percent and 70 percent respectively. In the post-test, there was a slight shift in that a larger percentage of persons (21 percent) agreed that current programs are now adequate. This could be attributed to the new Federal program which was passed on June 1971, which is referred to

Table 4. Perceptions of Adequacy of Current Student Financial Aid Programs

	Strongly Agree	Agree	Don't Know Undecided	Disagree	Strongly Disagree	\bar{X}	χ^2	t-test
The programs which are available now are quite adequate to meet the needs of students.								
Pre-test	3% (1)	9% (3)	17% (6)	58% (21)	14% (5)	3.7		
Post-test	0	21% (7)	9% (3)	49% (16)	21% (7)	3.7	n.s.	n.s.
The programs which are available now would be quite adequate if they were only properly administered.								
Pre-test	9% (3)	19% (7)	14% (5)	50% (18)	9% (3)	3.3		
Post-test	0	27% (9)	18% (8)	42% (14)	12% (4)	3.4	n.s.	n.s.
I favor increased federal aid to higher education.								
Pre-test	31% (11)	53% (19)	9% (3)	9% (3)	0	1.9		
Post-test	33% (11)	52% (17)	6% (2)	9% (3)	0	1.9	n.s.	n.s.
Some financial aid programs smell of socialism.								
Pre-test	3% (1)	31% (11)	40% (14)	17% (6)	9% (3)	2.9		
Post-test	3% (1)	40% (13)	33% (11)	15% (5)	9% (3)	2.9	n.s.	n.s.

as B.O.G. (Basic Opportunity Grant) as explained to the participants by James Nelson.

In responding to a second questionnaire item, "The programs which are available now would be quite adequate if they were only properly administered," slightly more than half of the respondents disagreed with this both before and after the workshop (59 percent and 54 percent respectively). Nearly one-fourth of the participants agreed with this notion both before and after the program.

Nearly all of the participants were in agreement that there should be increased federal aid to higher education--84 percent agreed the first day and 85 percent agreed during the final day of the session.

In the final question, the statement was made "Some financial aid programs smell of socialism" in an effort to determine certain possible political implications that the program participants might or might not favor. The results, although interesting, are not readily interpretable. Over one-third of the respondents (34 percent) agreed with this issue on the first day and 43 percent agreed during the last day. Again, 40 percent were uncertain at first and 33 percent were undecided at the conclusion of the program. Initially, 26 percent of the respondents disagreed with this statement, and finally, 24 percent were still in disagreement. One of the problems that is incurred in interpreting such findings is that the definition of "socialism" resides within the mind of each respondent. In constructing the questionnaire item, the investigators purposely introduced the word "smell" in order to elicit negative attitudes, but one respondent marked "strongly agree" and penciled in the comment "So what?" As has been suggested in a number of other responses as presented in the previous tables, the program participants

were generally characterized by a high degree of social connotation to them, the use of the word "socialism" may denote certain negative connotations in contrast to the general public and political usage (i.e., the New Deal).

Implications--Perceptions of Adequacy of Current Student Financial Aid Programs. There appears to be a general agreement among financial aid officers that there are NOT enough programs now available for student financial aids; this is so even if the present programs were to be more efficiently and properly administered. The respondents also indicated this attitude by the general consensus that the federal government must increase aid for higher education if they are to provide more aid to the prospective students of this nation.

Although the wording of the question "Financial aid smells of socialism" was intended to have a negative connotation, there is some reason to suspect that this was not the general reaction. In additional studies it might be well to explore this issue along with another one suggested above, i.e., "Colleges and universities should cease attempting to reform society." Empirical assessments along this particular dimensions could be instructive in predicting what type of impact that financial aid officers might have upon social change, social reform, and the amelioration of certain social problems.

Participants' Reactions to Program Content and Presentations

During the two week period of the workshop, a many topics were covered. The participants' reactions to each specific area are presented in Tables 5 and 6. Only a few of these areas will be discussed in the following pages. As indicated in Tables 5 and 6, the topics selected for discussion in this report are those which elicited the strongest reactions,

Table 5. Evaluation of Sessions and Presentations.

PART I

Please rate each of the following areas in relation to the Short Term Training Program.

Monday, July 10

	<u>Excellent</u>	<u>Very Good</u>	<u>Good</u>	<u>Fair</u>	<u>Poor</u>
Overview and Purpose of Program: Goals and Aims	9	9	14	0	0
Philosophy Development	3	9	15	5	0
Basic Federal Student Aid Programs Overview of three basic aid programs	17	10	2	1	1
Ross Park Seminar	9	5	7	2	2

Tuesday, July 11

Need Analysis	3	9	12	6	2
National Defense Student Loan, Educational Opportunity Grant, College Work Study Program, Case studies and role playing	7	11	10	4	0

Wednesday, July 12

College Work Study Programs and Development of Work Opportunities	8	10	11	1	1
History of Financial Aid and the Role of the Financial Aid Officer	15	10	7	0	0
Recent Congressional Action and the New Legislation	21	9	2	0	0

Thursday, July 13

Review and Evaluation	4	8	16	2	2
Regional Advisory Council	2	5	15	9	1

Table 5. (Continued)

	<u>Excellent</u>	<u>Very Good</u>	<u>Good</u>	<u>Fair</u>	<u>Poor</u>
Management Calendar	3	8	15	4	2
<u>Friday, July 14</u>					
Field Trips - Fort Hall and American Falls	11	8	8	1	1
Would you say that, in general, the workshop would be rated as:	9	18	3	2	2
In general, would you say that other participants feel that the workshop has been:	7	15	8	0	2

Table 6. Evaluation of Sessions and Presentation.

PART II					
Please rate each of the following areas in relation to the Short-Term Training Program.					
	<u>Excellent</u>	<u>Very Good</u>	<u>Good</u>	<u>Fair</u>	<u>Poor</u>
<u>Monday, July 17</u>					
Financial Aid Officer as Counselor	12	9	5	7	0
Theories and Techniques of Counseling	2	1	8	9	13
<u>Tuesday, July 18</u>					
Special Educational Services (Panel from trio program and other related agencies)	4	13	7	8	1
Recruiting the Disadvantaged (Panel Discussion)	4	6	12	8	4
<u>Wednesday, July 19</u>					
Psychology, Sociology and Economics of the Disadvantaged (Panel Discussion)	3	10	12	6	2
Psychology, Sociology and Economics of the Disadvantaged (Small Groups)	5	13	9	2	5
Seminar - Outdoor Amphitheater	16	7	6	2	0
<u>Thursday, July 20</u>					
Psychology, Sociology and Economics of the Disadvantaged (Panel Discussion) (6 No Response)	6	10	6	6	0
Psychology, Sociology and Economics of the Disadvantaged (Small Groups) (10 No Response)	8	11	3	2	0

Table 6. (Continued)

Please rate the following items:

	Excellent	Very Good	Good	Fair	Poor
Facilities (on campus) were	22	8	3	0	0

	Too Short	Just Right	Too Long
Length of Workshop was:	2	25	6

Would you say that:

<u>2</u>	Most of the information presented in the workshop was new to me
<u>22</u>	Some of the information presented in the workshop was new to me
<u>0</u>	None of the information presented in the workshop was new to me

Would you please describe your experiences in the small group sessions by checking the following items. What were your basic reactions to the groups you were in?

	<u>Often</u>	<u>Sometimes</u>	<u>Never</u>
Fear	0	9	4
Frustration	9	23	0
Negative	4	24	5
Nervousness	2	17	13
Informative	19	12	3
Worthwhile	20	12	1
Anger	3	25	5
Excitement	8	19	6
Resentment	5	23	5
Boredom	3	23	7
Awareness	16	14	1
Understanding	20	12	1

Other (Please specify) Acceptance (1), Intolerance (1), Fatigue (1)

Did you express your feelings in the small group? Yes 29 No 4

If you had it to do over again, would you enroll in this workshop (given the same format and personnel)?

Definitely Yes	Maybe	Unsure	Probably Not	Definitely Not
23	2	2	5	0

Would you recommend this same type of workshop for other financial aid officers?

Definitely Yes	Maybe	Unsure	Probably Not	Definitely Not
25	2	2	3	0

either positively or negatively.

One of the five major presentations consisted of an overview and review of the three Basic Federal Student Aid Programs (NDSL, EOG, and CWSP). The majority of the members of the seminar rated this presentation from good to excellent (88 percent). It would appear that such basic information had been previously lacking or that many financial aid officers were not fully informed of the intricacies of the basic aid programs. It should be noted, however, that a large percentage (49 percent) had worked in financial aids for one year or less and 89 percent had worked in the field for less than three years. Consequently, a great deal of the information presented revolved around issues which had been unclear or misunderstood. Apparently institutional policy varies a great deal from region to region with regard to the administration of the three basic aid programs; as a result, financial aid officers may be unsure of how to implement both institutional policy as well as federal guidelines when making decisions about administering student financial aid. Another reason for the apparent success of this particular presentation may be that a large part of the training of a financial aid officer is on-the-job training--as a consequence, certain vital areas such as the EOG program may not be fully understood by the individual. When the financial aid officer trainee is overwhelmed with other new responsibilities, he can hardly be expected to obtain all the needed knowledge of all possible programs in a few short weeks or months.

A second area of discussion which was received very favorably by the participants was that one which concerned the history and the role of the financial aid officer. In this presentation, many issues--social, psychological and physical--were covered which involve all members of

the financial aid field. In discussing a number of issues that the financial aid officer will encounter during the course of his career, the speaker emphasized that there shall be an increased demand for accountability in the area of student financial aid. It was stated that financial aid officers will have to become much more responsible for research in their field and that they will have to become increasingly oriented toward scientific research methods. Along with a predicted increase in federal and state financial aid programs for students, it was also predicted that the financial aid officers will face additional responsibilities, more paper work, and larger quantities of red tape. Since many of the people in the seminar expressed a dislike for the amount of paper work which is currently involved in their jobs (39 percent), this may be an even larger problem in the future. The very large problem which was described by the speaker revolves around the fact that many students are not at all informed about currently available programs; in the future, the financial aid officer will have to design programs that will allow the student to see all the possible avenues for obtaining financial aid through both the institution and the community. The group expressed the opinion that they already had too much to do in their jobs in merely administering the present programs--hence, it may be anticipated that they shall face additional problems in the future. On the other hand, the financial aid community shall also receive much more status and prestige in the future since they will be increasingly responsible for the funds coming into the college coffers.

This particular presentation was rated from good to excellent by 100 percent of the participants. This may be because most of the members of the seminar were rather recently assigned to their jobs as financial

aid officers and were not fully aware of the nature and scope of the programs that were described. A further indication of the recency of the participants into the field was found by one participant observer: many of the subjects were not aware of the fact that there are professional journals which deal with the area of student financial aid and expressed a desire to read certain articles which were mentioned in discussions and presentations. Perhaps there is a need for the compilation of a bibliography which could be distributed to financial aid officers so that recent entrants in the field would know where and how to obtain such literature.

The session dealing with the Financial Aid Officer as Counselor was divided into two blocks of instruction. One block dealt with the role of the financial aid officer as counselor, the second part described relevant theories and techniques of counseling. During the second presentation, a great deal of controversy was generated concerning the financial aid officer's role in the counseling situation. One comment was voiced by a participant that the financial aid officer should be dealing with a so-called "normal" population while a counselor would be or is concerning himself with the "abnormal" population on campus (even though these terms are not rigorously defined). This seems to be based upon a kind of interdisciplinary boundary maintenance in which one university agency or department does not interfere with the scope and responsibilities of any other. This seems to be the case that exists between the counseling services and the financial aid offices in the university situation. One result of this may be that the financial aid officer has little knowledge of the techniques which are used in counseling. In this session, the guest speaker described the similarities that the two different departments

may have in dealing with the student population. In refuting the argument that the two departments deal with two different types of individuals, he pointed out the fact that when an individual is in need of financial help, his dealings with the financial aids office is more often than not a final alternative approach. This in turn puts the students at the mercy of the financial aid officer. The financial aid officer who may base his decision on purely economic considerations can have an impact on the total life style of the student; this can have psychological as well as social implications. In terms of power relationships, the financial aid officer takes the form of a "significant other" and can determine the direction that a student will take. In essence, the financial aid officer puts on the counselor's hat if he wants to or not.

Another speaker demonstrated the importance of the decisions of the financial aid officer in his role as counselor. To the student, such decisions can lead to his dropping out of school, facing rejection by his wife or family, or even a type of societal ostracism for failing to make it in college. The financial aid officer had the potential of being the single campus agency with the greatest amount of influence on a student's life.

It was generally concluded that the financial aid officer must start assuming more responsibility for the student in areas other than mere financial aid. A package of aid must be provided that will benefit students psychologically, socially and financially. Since the counseling staff on most campuses have stagnated in terms of more new positions being available, and since the growing staffs of the financial aids offices are almost inevitable, it is almost imperative that the financial aid officer must assume increasing responsibility in the counseling

situation.

One major area of instruction, the Psychology, Sociology and Economics of the Disadvantaged, was broken down into two major parts: (1) a panel discussion led by minority group members (blacks, Indians, and Chicanos) and (2) small groups sessions.

The panel members addressed themselves to many of the issues presented in the Review of the Literature, e.g., the social problems one encounters when leaving the "ghetto" and entering the "white-oriented" campus. They also identified and discussed the difficulties of such things as the alienation one encounters when returning to the "old" neighborhood after spending time at a university. It quickly became evident that the minorities face at least two major problems in the college situation--breaking old ties with family and friends, and the problem of adjusting to the new environment of college life.

It was the impression of the participant observers that the group discussion took on the dimensions of a fight for the soap box by the minority group representatives. It was felt that little constructive argument or any real programs were proffered that could be implemented by the financial aid officer in his current role. It was at this particular point in the seminar that real frustrations, anger, and negative feelings were developed. The discussion seemed to be based around the notion that whatever a "white" person might suggest as a possible solution to racial and ethnic problems, a minority person would attack both the proposer and the proposal as being so divorced from reality as to never be able to solve the problem at hand. The overall impact of the small groups discussion are reflected in the responses given in Table 6: the large majority of the participants reported that they did, at least sometimes,

experience frustration, negative feelings, anger and boredom.

The participant observers felt that the main objectives of the small group discussions were obscured by the lack of direction exhibited by the people in charge of this particular session as well as by the participants themselves. On the other hand, it must be acknowledged that some relevant and useful information was exchanged, for nearly all of the participants felt that the small groups workshop was "often" and/or "sometimes" informative, worthwhile, and did stimulate awareness and understanding.

Finally, as is seen in Table 6, two separate questions were asked which were intended to assess reactions to the entire program; these were "If you had it to do over again, would you enroll in this workshop (given the same format and personnel)?" and "Would you recommend this same type of workshop for other financial aid officers?" To both of these items, the responses were overwhelmingly positive. The vast majority answered "Definitely Yes" and no one stated "Definitely Not." In summary, it must be said that the total program, at least as may be assessed by the participants' reactions to the course content and the presentations, was a success.

In Chapter Four a summarization of the findings is presented along with conclusions, implications, and recommendations for future programs.

CHAPTER FOUR

SUMMARY, CONCLUSIONS, AND RECOMMENDATIONS

Although we do recognize the dangers inherent in attempting to synthesize the thousands of bits of data collected in this study into a few evaluative statements regarding the success of the Short-Term Training Program for Student Financial Aid Administrators and Other Student Assistance Personnel, it is essential that we summarize our findings and note their implications for this and other prospective seminars and workshops. Organizational and administrative decisions regarding such programs must be made and the participants--be they financial aid officers, student service personnel, faculty, college board or other administrative staff--have a need for all of the manageable information possible on how such workshops and seminars might have an impact upon the enrollees. To be manageable, the findings must be combined and interpreted, and this requires boldness tempered with caution.

One major methodological problem must be considered in the interpretation of the findings. There were only 36 participants who enrolled in the program and three of these persons left prior to its termination. There is some reason to suspect that these subjects (who constituted nine percent of the sample) did hold views that often contrasted with those of the majority. Since the data were collected in such a manner as to ensure anonymity, however, there is no way to verify this particular hunch.

Two summary conclusions are presented which, in turn, are followed by supportive research findings concerning the impact of the short-term training program upon the enrollees. Following the discussion of the impact of the workshop recommendations are suggested concerning further needed knowledge and the implications of the findings of this study for future educational and administrative policy.

A. Summary of Conclusions

1. Although workshops and training programs are of relatively recent origin in the area of financial aid administration, there is sufficient evidence to conclude that the two-week seminar conducted at Idaho State University was generally successful in attaining its basic formal goals. As discussed under Recommendations, however, there are a few areas of intended impact in which alternative or modified approaches might be more successful.
2. The basic format and program content of the Short-Term Training Program for Student Financial Aid Administrators and Other Student Assistance Personnel that was held at Idaho State University was both well-received by the program participants and appears to be generally adequate for achieving its formal objectives. As discussed in the following section, however, certain modifications could enhance the general intent of similar future workshops.

B. Impact of the Program

1. On Job and Career Satisfaction. The majority of the financial aid and other student assistance personnel are satisfied with their present jobs. Like most people, they are not certain that they would like to make a lifetime career of their present positions. At the end of the two-week session, the participants expressed a somewhat lesser degree of job satisfaction. This might be partially explained by the fact that a number of currently and potentially new job responsibilities were highlighted throughout the program; new problems in role performances were predicted along with each new responsibility. Again, an intensive discussion of the many latent social problems which surround current job responsibilities may have worked to lessen the respondents' degree of self satisfaction with their own job performance.
2. Perceptions of the Job Role and Responsibilities of the Financial Aid Officer.
 - a. Primary Functions. At the beginning of the seminar, the majority of the participants "Strongly Agreed" that the primary functions of the financial aid administrator were to (1) assist students in obtaining financial assistance, (2) counsel students in the use of programs which are designed to help them, (3) be a type of student service, and (4) be of an administrative nature. At the end of the program, the strength of agreement with each of these items was considerably reduced. This is in line

with various philosophies expressed in the review of the literature which state that the financial aid officer should be multi-oriented, i.e., there should be an equal emphasis placed upon his responsibilities to the community and the school as well as to the student.

- b. **Understanding of Job.** At the end of the program most of the participants were much more strongly convinced of the importance of the job of the financial aid officer and they felt that this person is better equipped to accomplish the tasks assigned to him than might be the case with any other agency. On the other hand, nearly one-third of the subjects stated that the scope and the responsibilities of the financial aid officer had never been fully explained to them. It must be acknowledged, however, that the actual scope and responsibilities of this particular office are likely to vary markedly from one academic setting to another; hence, it would be a very conditional enterprise to attempt to specify job role requirements during a two-week seminar.
- c. **Relationships and Responsibilities to the University.** The majority of the respondents stated that they were generally satisfied with the kinds of relationships that exist between their offices and other areas of university and college administration. They did not feel that the administration of financial aids should

be kept separate from other areas of college administration and they were generally able to operate in accord with their own better judgment since other college administrators do not appear to exert an undue amount of control over financial aid procedures and regulations. Most of the participants felt that financial aid officers should become much more involved in recruiting disadvantaged students; they felt that they should be concerned with the total amount of indebtedness that a student accrues during his educational career; and they expressed a need for more "humanization" in their dealings with students. On the other hand, given that a student failed his first year in college, one-fourth of the respondents stated that they would not feel committed to financing the student for a second attempt.

- d. State of the Discipline. At the conclusion of the program, the enrollees were considerably more likely to agree that the financial aid occupation should be professionally upgraded by (1) having specific academic requirements and/or credentials, and (2) establishing more rigorous standards for financial aid officers. The majority also felt that there should be a National Code of Ethics. At present, most of the respondents felt that the best way to obtain the needed knowledge of the area of financial aid administration is through on-the-job training, but at the end of the training program, they were overwhelmingly in favor of the use of seminars, workshops, and similar endeavors. Again, at the close of the seminar, there was considerably more unanimity with regard to the

idea that there is a general consensus among financial aid officers about the national goals to be achieved by the profession.

3. Perceptions of Academic Issues and Social Problems.

- a. Perceptions of the Student's Own Responsibilities for Financial Aid. The majority of the participants felt that students who receive financial aid should work during the summer if they are not enrolled in classes. At the end of the program, the subjects were considerably more likely to disagree with the notion that (1) a student who is not willing to work for the financial aid that he receives does not deserve a college diploma, and (2) a student who applies for financial aid should be willing to accept whatever might be made available. The members of the workshop were nearly unanimous in their agreement that most students are quite uninformed about the different types of aid that might be available to them. The noted changes in these responses over the two-week period suggest that the financial aid officers became considerably more empathetic toward the student's social, educational and financial needs.
- b. Perceptions of Administrative Problems in Financial Aids. It was found that at the end of the two-week session, the participants were considerably more likely to consider the needs of the student while faced with situations which might impede their own job performance.

They were much more likely to indicate that they would take time off from a busy schedule to see students who were late for appointments and they all agreed that reducing the amount of paperwork for students is a major problem. Again, at the conclusion of the seminar, they were much more likely to indicate that they would be willing to finance "risky" students; and they were considerably less certain about the notion that the best measure of a successful program is based upon the number of students who graduate. Finally, virtually all of the participants declared that most college administrators and faculty members are almost remarkably uninformed about the requirements, the responsibilities, the duties and the importance of student financial aid administration.

- c. Perceptions of Problems with Minority and Disadvantaged Students. In this area, it is apparent that, once again, the two-week session was instrumental in defining and highlighting the different problems of various types of students. At the end of the program, the participants were more likely to agree that it might be appropriate for needy students from deficient educational backgrounds to receive grants along with reduced course loads. Most of them felt that such a practice would in no way reduce the current academic standards in most colleges and universities. On the other hand, there was no evidence that the group would generally resort to any type of

"reverse discrimination" in their dealings with students--this was true no matter if the bases for the relationship might be racial, ethnic or sexual. They were slightly more likely to state that it is more important to help the poor student than it is to help the student from a middle class or upper class background, but they also agreed that there should be more programs available to help the latter kinds of students.

- d. Attitudes About Human Nature. The participants, both at the beginning and at the end of the workshop, were decidedly mixed in their opinions about whether or not colleges and universities should try to reform society. At the end of the two-week period, about half of the enrollees felt that this should be the case, about one-third did not know for sure, and one-fifth disagreed. On the other hand, most of the respondents seemed to feel that social problems such as poverty and unemployment might be social rather than individual problems, for most of them disagreed that these things are caused simply by a lack of "will power" or "motivation." Somewhat surprisingly, however, most of them did agree that "Human nature being what it is, there will always be some who are poor and unemployed."

4. Perceptions of Adequacy of Current Student Financial Aid Programs.

There was a general agreement among the program participants that there are not enough programs currently available for student financial aid. The inadequacies of the current program, they

felt, would not be ameliorated merely by more efficient administration. Hence, there was a general consensus that there should be increased federal aid to higher education. There was a slight increase among those who answered that "Some financial aid programs smell of socialism," but some unsolicited comments such as "So what?," etc., make it difficult to interpret this finding.

5. Participants' Reactions to Program Content and Presentations.

Although a great many topics were covered at varying lengths and depth, the particular discussions which seemed to be the more favorably received seemed to be those which dealt with (1) what is a financial aid officer, (2) what is he supposed to do, and (3) what sorts of things are there for him to work with, i.e., laws, rules, regulations, and current prospective financial aid programs. The subjects and presentations which did not seem to be accented quite as enthusiastically appeared to be those concerning (1) philosophies, (2) theories, (3) ethics, and (4) the nature and scope of social issues, e.g., poverty, race and ethnic relations, and problems of the socially disadvantaged. On the latter issue, many of the participants expressed their feelings that there had been a kind of "minority group overkill" during the two days devoted to that topic.

C. Recommendations

What can be said on the basis of the above findings? Briefly, we believe that the research findings, our own observations and the comments

of program participants made to us in informal settings and on questionnaire forms support the following recommendations:

1. In future workshops, more emphasis might be placed upon the instruction of the facilitation of certain bureaucratic and administrative procedures, i.e., how to do the book work and the handling of certain paper work in a more efficient manner. The respondents of this particular project expressed a positive reaction to virtually all speakers who explained new federal programs or who elaborated on present federal programs for student financial aid. Fifty percent of the participants stated that the information which was the most valuable to them was the technical guidelines for federal programs.
2. There should be a complete bibliography made available--this would facilitate the location of related literature both for new incumbents and for future workshop usage.
3. There should be more opportunity for informal interaction among participants, especially between whites and non-whites. While 42 percent of the respondents reported that they had a more positive feeling toward or a better understanding of minority group problems, 25 percent of the participants expressed a certain amount of dissatisfaction with what was termed an "overkill" of minority issues. Very often, suggestions and proposals proffered by whites elicited a great deal of negativism and adverse reactions from non-whites and visa versa.
4. Various experts on cultural values and sub-cultural differences should be introduced in sessions dealing with minority and

disadvantaged groups. The investigators had the distinct impression that the majority of the program participants were fully committed to performing their responsibilities as best they knew how; the problem is that they often were unaware of variations in various kinds of verbal and non-verbal expressions (direct eye contact, for example, has quite different meanings depending on whether one is working in a white or a Chicano subculture) as well as other kinds of adjustment problems. If any such subcultural variations in expression, along with other unique behavioral and attitudinal configurations, were merely defined and discussed, it might be anticipated that the program participants would work diligently to mitigate misunderstanding and misinterpretations.

5. One suggestion for future workshops which was expressed by the participants was that small group discussions should be implemented at the beginning rather than at the end of the workshop. The reason for this was that some felt that they did not have an opportunity to informally interact with other small group members and that some antagonisms were developed as the program progressed (e.g., "We have been here for a whole week and today is the first time that you have even talked or acted kindly toward me."). One problem seems to be that in an undirected or unsupervised informal grouping, people tend to operate on the basis of pre-eminence, i.e., "Who is there in this group that is likely to like me and like the things that I say?" Consequently, long-haired people associate with long haired; blacks make friends with blacks; Chicanos converse with

Chicanos; and the white-shirt-suit-and-tie group of itself away from the others. As a result, people in with other members of the workshop who shared similar attitudes, beliefs and opinions and failed to discuss these with those of differing persuasions. At the end of the first week, there was an apparent clique structure and a type of polarization.

6. In the future, more emphasis should be placed on the financial aid officer's responsibilities in counseling. The participants in this particular workshop appeared reluctant to explore this particular area. A rather large and vocal segment of the workshop enrollees expressed their hesitancy about involving themselves in this type of student relationship. This might be because (1) there are already too many responsibilities that the financial aid officer must assume without this particular additional burden; (2) financial aid officers may not feel as if they have the necessary training and qualifications for counseling; or (3) they may feel that their particular role in the academic community should negate the need to counsel and they should only be concerned with the administration of funds. It is our belief, however, that in future workshops the participants should explore the dimensions of student counseling regarding certain functional aspects (new and present programs, etc.) and psychological aspects (e.g., support of the student in the interview situation, positive reaction to the student, etc.). Again, the program participants should be made to explore the bases upon which they might be resistant to such responsibilities.

7. It is suggested that other college administrators and faculty members should become increasingly involved in such programs. The program participants very heartily agreed that these kind of academic personnel are almost totally ignorant of the social nature and purpose of student financial aids. It is urgent that steps be immediately undertaken to resolve this difficulty-- a difficulty which exists for administrators, faculty members, financial aid personnel and for the students.
8. The field trips were a success, but some of the participants were not very enthusiastic about the entire group descending upon a migrant labor camp and an Indian reservation. This might be done in small groups and perhaps a bit more subtle in its approach ("It is just like taking the kindergarten class to see the monkeys in the zoo."). The concept of field trips does exert an impact, and a powerful one at that, but it could be implemented with more discretion.
9. The length of the workshop--two weeks--appears to be optimal. Most of the respondents felt that this period of time was "Just Right."
10. Considerably more emphasis should be given to the different kinds of problems that various types of students can be expected to encounter on the college campus. As noted in the section on findings, many of the participants feel that they should become involved in recruiting the disadvantaged; many of them felt that it might be appropriate to give grants and reduced course loads to such students; and some of them even came to recognize the difficulties that these persons might have in obtaining summer

work and therefore wouldn't demand this as a prerequisite for the continuance of financial aid--but there were many who seemed to believe that opportunity should be given. This is indicated by the findings that many of the respondents felt that they should not finance a student who had failed the first year of college. One year is a very short time for a student to make the transition from a lifetime of societal exclusion to that of a white-oriented campus situation.

11. Finally, it cannot be too strongly emphasized that much more research must be done in this entire area. This particular study, based upon a very small sample, must be viewed as an exploratory attempt. The findings of this project, however, can be used as a guideline in the formulation of future workshops and as a comparative basis for the results. A number of attitudinal orientations have been identified in this work which may have a direct bearing upon the whole impact of the financial aid endeavor. It is to be hoped that empirical assessments such as this one can and will be employed in future attempts of program implementation, evaluation, and basic and applied research.

APPENDICES

- A Agenda: Short Term Training Program
For Student Financial Aid Administra-
tors and Other Student Assistance
Personnel**
- B Program Evaluation Questionnaire**
- C Evaluation of Sessions and Presen-
tations (Parts I and II)**
- D A Review of Federal Student Finan-
cial Aid Programs**

**SHORT TERM TRAINING PROGRAM FOR STUDENT FINANCIAL AID ADMINISTRATORS
AND OTHER STUDENT ASSISTANCE PERSONNEL - JULY 9, - JULY 21, 1972**

Agenda

- JULY 9, SUNDAY** All Day Registration and Check-in
- JULY 10, MONDAY**
- 9:00 - 9:15 Welcome - Dr. Vern Estrud, Director of Development and Institutional Research, Idaho State University
 - 9:15 - 9:45 Overview and Purpose - A general explanation of the training program including aims and goals. Questions and discussion will be entertained; Kathleen McCullough and David Minnowell
 - 9:45 - 10:15 Course Registration
 - 10:15 - 10:30 Break
 - 10:30 - 11:00 Philosophy Development - The first of daily 30 minute sessions devoted to individual reflection of personal and institutional philosophy of student financial aid, particularly in relation to the disadvantaged student. Kathleen McCullough
 - 11:00 - 12:00 Work Session, Dr. Cliff Brynn, Assistant Professor of Sociology, Idaho State University
 - 1:00 - 4:00 Basic Federal Student Aid Programs - an overview and review of the three basic aid programs; Tom Monahan, Program Officer, USOE Region VIII
 - 6:30 Ross Park Seminar
- ~~JULY~~ 11, TUESDAY**
- 8:00 - 12:00 Need Analysis - An examination of the general methods of need analysis including the proposed federal system; Rich Black, USOE Central Office, Washington, D.C.
 - 1:00 - 3:00 National Defense Student Loan Program - Case studies on typical and atypical applications followed by role playing situations involving participants; David Perkins, Director of Student Services, College of Southern Idaho, and Gary Gould
 - 3:00 - 5:00 Educational Opportunity Grant Program - Case studies and typical and atypical applications followed by role playing situations involving participants; Jerry Martinez, Student Support Services Program Officer, USOE Region VIII, and Gary Gould
- JULY 12, WEDNESDAY**
- 8:00 - 10:00 College Work Study Program and Development of Work Opportunities - Case studies of CWS and an action discussion on the development of work opportunities, both on- and off-campus; Charles Wright, Director of Financial Aid, University of Utah and Gary Gould
 - 10:00 - 12:00 History of Financial Aid and the Role of the Financial Aid Officer - A Presentation of the history of financial aid with special emphasis on professional development of the financial aid officer; James Nelson, College Entrance Examination Board, New York City

WEDNESDAY (cont.)

1:00 - 4:00 Recent Congressional Action and the New Legislation; James Nelson

JULY 13, THURSDAY

8:00 - 4:00 Field Trips, Fort Hall Indian Reservation and American Falls migrant labor camp - Small groups will visit different areas of the reservation and the labor camp with the opportunity to discuss living conditions and other subjects with residents and administrative personnel; Roy Urrea and Bernadine Ricker, Talent Search, Idaho State University.

JULY 14, FRIDAY

8:00 - 10:00 Review and Evaluation - The week's activities will be discussed, unanswered questions resolved and time spent on any areas that the participants desire. A mid-program evaluation at the direction of Dr. Bryan will be conducted; Gary Gould

10:00 - 12:00 Regional Advisory Council - The purpose and accomplishments of the Region X, Division of Student Assistance, Advisory Council will be presented; Ed Baseheart, Financial Aid Program Officer, USOE Region X.

1:00 - 4:00 Management Calendar - In order to facilitate organization of the highly complex functions of the aid office, a model yearly calendar will be constructed and discussed; Ed Baseheart.

JULY 17, SUNDAY

8:00 - 4:00 Overview: Relating the Financial Aid Office to the Counseling Needs of Students.

8:00 - 12:00 The Financial Aid Officer as Counselor; Dr. Martin Brooks, Counseling Center, Idaho State University

1:00 - 4:00 Theories and Techniques of Counseling; Dr. Arthur P. Lloyd, Chairman, Department of Counselor Education and Special Education, Idaho State University.

JULY 18, TUESDAY

8:00 - 12:00 Special Educational Services - Personnel of the trio programs and other related agencies will explain their services and entertain questions; David Ayarra, Director, Upward Bound, Idaho State University; Bernadine Ricker, Director, Talent Search, Idaho State University; Billinell Grely, Director, Student Special Services, Idaho State University; Charles Mitchell, Director, Minority Affairs, University of Washington; Gilbert Teton, Bureau of Indian Affairs, Fort Hall, Pablo Fuentes, Idaho Migrant Council, Boise, General consultant, Claricy Smith, Student Special Services Program Officer, USOE Region X.

TUESDAY (cont.)

1:00 - 4:00 **Recruiting the Disadvantaged** - A panel discussion with several of the morning participants and including other involved personnel will discuss problems and methods of recruitment; Dick Winder, Director of Admissions, College of Idaho; Tim Hayhurst, Director of Admissions, Idaho State University; David Ayarra; Rodney Sheppard, Idaho State University student; Ella Hiverda, Counselor, Kimberly High School; Bernadine Ricker; Charles Mitchell, Dr. Martin Brooks, moderator.

5:30 **Police Cabin Seminar**

JULY 19, WEDNESDAY

8:00 - 12:00 **Psychology, Sociology and Economics of the Disadvantaged** - A panel discussion involving a student member of each of three minority groups and professional persons, also from each minority group. a thorough explanation of all facets of the special needs of the disadvantaged will be presented. Jerry Swisher, Director, Special Educational Services, Idaho State University; Bernadine Ricker; Charles Mitchell; Blanca Ingram, Talent Search; Roy Urrea, LaMada Boyer and Rodney Sheppard, Idaho State University students; Dr. Brooks and Dr. Bryan, moderators.

1:00 - 4:00 **Continuation of Morning Topic, Small Group Discussions** - Program participants will form small group sessions to continue discussions and points of view presented in the morning session. Panel members will be group leaders.

JULY 20, THURSDAY

8:00 - 4:00 **Psychology, Sociology and Economics of the Disadvantaged, Con.** - the basic format of Wednesday's sessions will be continued

JULY 21, FRIDAY

8:00 - 12:00 **Review and Evaluation** - Post-program measurement will be administered. Time will also be allowed for completion of narrative of personal philosophy of student financial aid; Dr. Bryan and David Blackwell.

12:00 - 1:30 **Luncheon: Anticipated Trends in Student Financial Aid**

1:30 - 3:00 **Final Problems and Unresolved Questions** - Gary Gould

PROGRAM EVALUATION QUESTIONNAIRE

SHORT TERM TRAINING PROGRAM FOR STUDENT FINANCIAL AID ADMINISTRATORS AND OTHER
STUDENT ASSISTANCE PERSONNEL - July 9 - July 21, 1972

Introduction

The purpose of this questionnaire is to help us to assess the impact of this program upon all participants. The data to be gathered will be treated as group data - no individuals shall be identified at any time. All information shall be kept strictly confidential and handled exclusively by an independent outside evaluator - Dr. Bryan of the ISU Department of Sociology. In order to help us in these objectives, we urge you to be as truthful and honest as possible. The first few questions are aimed at standard biographical background characteristics: this will help us to assess what kinds of persons are presently serving in Financial Aid. The second group of questions are primarily indicators of various attitudes and opinions. It is this area which is of the greatest concern to this research. Your cooperation will be sincerely appreciated.

The results of this evaluation study will be made available to you upon request. It is hoped that the findings will be helpful in providing direction for future programs. Thank you for your help and cooperation.

3. Sex: Male _____ Female _____
4. Age: Under 20 _____ 20-25 _____ 26-30 _____ 31-35 _____ 36-40 _____ 41-50 _____ Over 51 _____
5. What state are you from? _____
6. What is your current level of educational attainment?
Less than B.A. _____ B.A. _____ M.A. _____ Ph.D. _____
7. Do you plan to further your formal education? Yes _____ No _____
8. How long have you worked at your present job?
Less than a year _____ 1-3 years _____ 4-6 years _____ Over 7 years _____
9. What occupation did you hold for the longest time before your present job?

10. Have you participated in any in-service training programs or workshops prior to this one? Yes _____ No _____
11. What is your annual salary?
Less than \$5000 _____ \$5000-\$6999 _____ \$7000-8,999 _____ \$9000-10,999 _____
\$11,000-12,999 _____ \$13,000-14,999 _____ \$15,000-16,999 _____ Over \$17,000 _____
12. In which type of school do you presently serve?
_____ Junior or Community College
_____ Technical School
_____ Four year College or University
_____ Public
_____ Private

13. If your duties include other than the administration of student financial aid, please indicate: _____

In the following section, please circle the number which best reflects your opinion: 1 = Strongly Agree; 2 = Agree; 3 = Don't Know or Undecided; 4 = Disagree; 5 = Strongly Disagree.

	<u>Strongly Agree</u>	<u>Agree</u>	<u>Don't Know or Undecided</u>	<u>Disagree</u>	<u>Strongly Disagree</u>
14. I am generally satisfied with my job.	1	2	3	4	5
15. I think I will make my present job a life-time career.	1	2	3	4	5
16. The primary function of a financial aid officer is to assist students in obtaining financial assistance.	1	2	3	4	5
17. The administration of financial assistance can be properly accomplished only by financial aid officers.	1	2	3	4	5
18. A major problem facing financial aid officers is that of reducing the amount of paperwork for students.	1	2	3	4	5
19. There should be more rigorous standards for financial aid officers.	1	2	3	4	5
20. The primary function of the financial aid officer is to counsel students in the use of programs which are designed to help them.	1	2	3	4	5
21. Most students are pretty well-informed about the appropriate types of financial assistance which is available to them.	1	2	3	4	5
22. There is little agreement among financial aid officers with respect to national goals.	1	2	3	4	5
23. The position of a financial aid administrator is primarily a student service.	1	2	3	4	5
24. The job of a financial aid officer is primarily administrative in nature.	1	2	3	4	5

	<u>Strongly Agree</u>	<u>Agree</u>	<u>Don't Know or Undecided</u>	<u>Disagree</u>	<u>Strongly Disagree</u>
25. Most college administrators and faculty members do not understand the importance of financial aid.	1	2	3	4	5
26. Most college administrators and faculty members do not understand the job requirements and responsibilities of financial aid administrators.	1	2	3	4	5
27. The programs which are available now are quite adequate to meet the needs of students.	1	2	3	4	5
28. The programs which are now available would be quite adequate if they were only properly administered.	1	2	3	4	5
29. There is a definite need for specific academic or credential requirements to upgrade the profession.	1	2	3	4	5
30. There is a definite need for more "humanization" in the financial aids profession.	1	2	3	4	5
31. The best way to obtain the needed knowledge for financial aid administration is on-the-job training	1	2	3	4	5
32. There is a definite lack of adequate workshops, programs and seminars for financial aid officers.	1	2	3	4	5
33. It is more important to aid the poor student than it is to aid the student from a middle class family.	1	2	3	4	5
34. The best criterion for determining whether to grant aid to a student is his past academic success.	1	2	3	4	5
35. There are not enough financial aid programs for middle and upper-class students.	1	2	3	4	5
36. A student who applies for financial aid should be willing to accept whatever might be made available.	1	2	3	4	5

	<u>Strongly</u> <u>Agree</u>	<u>Agree</u>	<u>Don't Know</u> <u>or</u> <u>Undecided</u>	<u>Disagree</u>	<u>Strongly</u> <u>Disagree</u>
37. If we continue to finance so many "disadvantaged" students with poor educational backgrounds, we will reduce college standards and impair the progress of the nation.	1	2	3	4	5
38. A student who is not willing to work for the financial aid that he receives does not deserve a college diploma.	1	2	3	4	5
39. Needy students with deficient educational backgrounds should be given grants and reduced course loads.	1	2	3	4	5
40. Colleges and universities should cease trying to reform society.	1	2	3	4	5
41. Most people who do not get ahead simply lack motivation.	1	2	3	4	5
42. Human nature being what it is, there will always be some who are poor and unemployed.	1	2	3	4	5
43. I feel that the work of a financial aid administrator is very important.	1	2	3	4	5
44. It has never been explained to me just what the scope and responsibilities of a financial aid administrator should be.	1	2	3	4	5
45. Many of the things that I have to do in my job go against my better judgement.	1	2	3	4	5
46. I favor increased federal aid to higher education.	1	2	3	4	5
47. Some financial aid programs smell of socialism.	1	2	3	4	5
48. Most people who don't get ahead just don't have enough will power.	1	2	3	4	5
49. University administrators have too much control over financial aid procedures and regulations.	1	2	3	4	5

	<u>Strongly Agree</u>	<u>Agree</u>	<u>Don't Know or Undecided</u>	<u>Disagree</u>	<u>Strongly Disagree</u>
50. Financial Aid administrators should continue to give aid to those individuals who fail to meet academic requirements during their first year in college.	1	2	3	4	5
51. One of the best measures of the successful financial aid program is the number of students who graduate under the program.	1	2	3	4	5
52. All other things being equal (need, ability, potential, etc.), a male should receive priority over a female in financial aid, for the man will be the breadwinner in our society.	1	2	3	4	5
53. All things being equal (need, ability, potential, etc.), minority group members should be given preference when seeking financial aid.	1	2	3	4	5
54. Financial Aid administrators should not concern themselves with the total amount of indebtedness that a student incurs in obtaining an education.	1	2	3	4	5
55. A national Code of Ethics should be developed for financial aid administrators.					
56. Individuals who receive aid should be required to work during the summer if they are not attending classes.	1	2	3	4	5
57. Because of the heavy burden on financial aid officers, students who are late for appointments should be made to come back at a later date.	1	2	3	4	5
58. The administration of financial aids should be kept completely separate from other areas of college administration.	1	2	3	4	5
59. Financial aid administrators should become more involved in recruiting disadvantaged prospective college students (e.g., going to high schools, into the community, etc.)	1	2	3	4	5

60. The most adequate criteria for determining who should receive financial aid assistance is _____

61. The most important source of revenue for a college student should come from _____

62. The area(s) of financial aid that needs the most improvement or modification is (are): _____

63. The most important aspect of my job as a financial aid officer is _____

64. The most rewarding aspect of my job as a financial aid officer is _____

65. The most unrewarding part of my job as a financial aid officer is _____

Code _____
 Coln 1,2)

Evaluation of Sessions and Presentations

PART I

Please rate each of the following areas in relation to the Short Term Training Program.

Monday, July 10

	<u>Excellent</u>	<u>Very Good</u>	<u>Good</u>	<u>Fair</u>	<u>Poor</u>
3. Overview and Purpose of Program: Goals and Aims (Kathleen McCullough and David Blackwell)	1	2	3	4	5
4. Philosophy Development (Kathleen McCullough)	1	2	3	4	5
5. Basic Federal Student Aid Programs Overview of three basic aid programs (Tom Monahan)	1	2	3	4	5
6. Ross Park Seminar	1	2	3	4	5

Tuesday, July 11

7. Need Analysis (Ed Baseheart)	1	2	3	4	5
8. National Defense Student Loan, Educational Opportunity Grant, College Work Study Program, -Case studies and role playing (David Perkins and Gary Gould)	1	2	3	4	5

Wednesday, July 12

9. College Work Study Programs and Development of Work Opportunities (Harold Weight and Gary Gould)	1	2	3	4	5
10. History of Financial Aid and the Role of the Financial Aid Officer (James Nelson)	1	2	3	4	5
11. Recent Congressional Action and the New Legislation (James Nelson)	1	2	3	4	5

Thursday, July 13

12. Review and Evaluation (Dr. Bryan and Gary Gould)	1	2	3	4	5
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	<u>Excellent</u>	<u>Very Good</u>	<u>Good</u>	<u>Fair</u>	<u>Poor</u>
13. Regional Advisory Council (Ed Baseheart)	1	2	3	4	5
14. Management Calendar (Ed Baseheart)	1	2	3	4	5

Friday, July 14

15. Field Trips - Fort Hall and American Falls	1	2	3	4	5
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Would you say that, in general, the workshop would be rated as:	1	2	3	4	5
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In general, would you say that other participants feel that the workshop has been:	1	2	3	4	5
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To date, what parts of the workshop have been the most valuable for you?

To date, what parts of the workshop have been the least meaningful and could have been eliminated?

What suggestions would you have that would make this workshop more meaningful and effective during the remaining time period?

29. Would you say that:

- ☐ Most of the information presented in the workshop was new to me
☐ Some of the information presented was new to me
☐ None of the information presented was new to me

Would you please describe your experiences in the small group sessions by checking the following items. What were your basic reactions to the sessions by checking the items you were in?

	<u>Often</u>	<u>Sometimes</u>	<u>Never</u>
30. Fear	1	2	3
31. Frustration	1	2	3
32. Negative	1	2	3
33. Nervousness	1	2	3
34. Informative	1	2	3
35. Worthwhile	1	2	3
36. Anger	1	2	3
37. Excitement	1	2	3
38. Resentment	1	2	3
39. Boredom	1	2	3
40. Awareness	1	2	3
41. Understanding	1	2	3
42. Other (Please specify) _____			

43. Did you express your feelings in the small group? ☐ No

44. If not, why not _____

45. What information in the Short Term Training Program was the most valuable for you?

46. What information was the least meaningful or could have been eliminated?

47. What suggestions would you have that would make a similar workshop more effective in the future?

48. If you had it to do over again, would you enroll in this workshop (given the same format and personnel)?

☐ Definitely yes ☐ Maybe ☐ Unsure ☐ Probably Not ☐ Definitely Not

49. Would you recommend this same type of workshop for financial aid officers?

☐ Definitely Yes ☐ Maybe ☐ Unsure ☐ Probably Not ☐ Definitely Not

REVIEW OF FEDERAL STUDENT FINANCIAL AIDS PROGRAMS

EDTA SHORT-TERM PROGRAM

Idaho State University
Pocatello, Idaho May 21, 1972

Read each question quickly and answer the questions as best you can. Those questions you are not sure of may not be answered.

1. NDEA is an abbreviation for _____
2. CERP is an abbreviation for _____
3. The abbreviation BOG stands for _____
4. The first of these federal student financial aids provided by Congress was the NDEA, signed in what year _____
5. The BOG program was provided for by what act? _____
6. In what year? _____
7. What act provided for the College CERP? _____
8. When? _____
- 9-11 Generally speaking, there are three classes of students that are not eligible for any of the three college-based financial aid programs.
(a) _____ (b) _____ (c) _____
12. Students otherwise eligible must ~~own~~ work at least _____ academic hours in order to receive either a Work-Study job or an ~~loan~~ grant.
13. NDEA loans have a _____ % interest rate
14. The grace period for NDEA loans ~~ends~~ ends after a student ceases to be at least a half-time student at an eligible institution.

- 15-16 EOG funds are awarded in two categories (a) _____ and (b) _____.
17. The institution signs a document with the U.S. Commissioner of Education after eligibility is established but before funds are awarded to the institution. This document is called _____.
18. A student who has not received help from his parents for either the current year or the previous year and has not been declared as a dependent on his father's federal income tax return is considered _____.
19. The minimum wage that may be paid under the OWSP regulations is \$_____ per hour.
20. The maximum wage that may be paid under the OWSP regulations is \$_____ per hour.
21. The institution may allow a work-study student to work no more than _____ hours per week on the average during any quarter or semester.
22. An _____ should be on file in support of the fact that a student is emancipated.
- 23-24 Name two conditions under which a student under the OWSP may work 40 hours during a week.
- 25-26 A student must be enrolled for at least a _____ academic load to be eligible for an NDEA loan. Name two other requirements of eligibility: (a) _____ (b) _____.
- 27-28 Name at least two systems of need analysis (a) _____ (b) _____ (c) _____ (d) _____.
29. Advances based on NDEA loan award letter must be signed for by the recipient on the _____.
- 30-31 Former borrowers may cancel their notes at a 15% rate provided they are full-time teachers of _____ or are teaching in a school district _____.
32. The borrower is responsible to the _____ for the repayment of this NDEA loan.

33. At the present time there are 3 time intervals that an institution may elect for their student borrowers' repayment plans. What are they?

(a) _____ (b) _____ (c) _____

36. The difference between the family assets available and the educational cost is called _____

37-38 All institutions should have a reference document that states policy and describes procedures to be followed by both students in applying for financial aids and by staff in processing. List at least two reasons for such a document.

(a)

(b)

39-41 At the time a student borrower leaves the institution, an exit interview is a requirement. State three purposes of the exit interview.

(a)

(b)

(c)

42. Which of the financial aids are graduate students ineligible for?

43. Teacher cancellation should be extended to other professions such as _____

Indicate if the following statements are True or False:

- ___ 1. An accumulation of 9 months away from school will cause the grace period to expire.
- ___ 2. Student eligibility for federal financial aids is determined by the institution.
- ___ 3. Once a student has established eligibility, he may participate in federal financial aids until he transfers to another school or until he reaches age 21.
- ___ 4. Work-study students must be paid at least once a month.
- ___ 5. Work-study students may work for more than one supervisor.
- ___ 6. A work-study student may earn no more than his identifiable need during an academic year.

- ___ 7. All loans made under the NDEA program must be made by individual check.
- ___ 8. Both graduate and undergraduate students must study at least 8 hours to be eligible for an NDEA loan.
- ___ 9. Cancellation privileges are available for any borrower who subsequently teaches in an approved school.
- ___ 10. A former borrower may cancel up to 50% of his loan at the rate of 10% per year for five years of teaching in eligible schools.
- ___ 11. A former borrower may under certain conditions cancel all of his loan.
- ___ 12. The Federal Government has the responsibility for the collection of all loans.
- ___ 13. Annual repayment plans are the plans most often selected by the student.
- ___ 14. Students may repay their notes without penalty.
- ___ 15. Under certain conditions student borrowers can arrange to fulfill their repayment obligations without paying any interest.
- ___ 16. Student borrowers who subsequently teach may cancel a part of their loan if their teaching is in a public school.
- ___ 17. Any student may be assigned a CERP job if he is willing to work.
- ___ 18. Student earnings are not considered in determining need.
- ___ 19. Under current regulations, a student may earn enough to make himself ineligible for an EOG.
- ___ 20. At the present time, there is not enough money in the CERP awards to allow for off-campus agreements.
- ___ 21. A student placed in a Work-Study job in the summer, who can still live at home is required to save 50% of his earnings to pay for his educational expenses the following fall.
- ___ 22. The Guaranteed Loan Program is sometimes referred to as the Federally Insured Loan Program.
- ___ 23. Federal funds may be transferred from one program to another by the Director of Student Financial Aid on a campus with approval of the Regional Director of Higher Education.
- ___ 24. The Regional Director of Higher Education has the authority to transfer unused funds from one institution within the region to another institution if needed.
- ___ 25. It would be desirable if all SFA officers had some background or experience in counseling.

- ___ 26. Student financial aid is ~~now~~ emerging as a profession on the college campus.
- ___ 27. A profession must have a ~~unique~~ body of significant knowledge.
- ___ 28. Collections of NDEA loans ~~have~~ caused institutional ~~many~~ problems.
- ___ 29. The exit interview should be conducted by the business office.
- ___ 30. Most financial aid should be distributed on the basis of academic ability.
- ___ 31. Freshmen should be ~~given~~ grants or loans in preference to work as the work may interfere with their study time.
- ___ 32. No more than 10% of any student body should be offered student financial aid.
- ___ 33. Department heads should employ directly the help they need under the College Work-Study Program.
- ___ 34. An institution should ~~have~~ teacher cancellation to a borrower if other schools are permitting cancellation for the same teaching.
- ___ 35. Teacher cancellation should be stopped.
- ___ 36. A committee of faculty and students should have ~~final~~ authority in regard to each individual award.
- ___ 37. A committee on student financial aids should ~~define~~ its activities to policies and serve as an appeals agency of the institution.
- ___ 38. In general, it ~~is~~ inappropriate to have Work-Study students employed in positions dealing with confidential information.
- ___ 39. All institutional part-time employment should be under the direction of the director of student financial aid or should be ~~sanctioned~~ by him.
- ___ 40. College Work-Study Program should not be used to match SAC's.
- ___ 41. SAC awards should normally be determined and awarded in absence of other financial aid.
- ___ 42. The college is responsible for the collection of student loans, whether the loan is made by a bank or by the institution itself.